REMINGTON CARRIAGE MUSEUM

Destination Resort Plan

FEBRUARY, 1989

Alberta
TOURISM

91-06711/

Alberta
TOURISM

Office of the Deputy Minister

18th Floor, 10025 Jasper Avenue, Edmonton, Alberta, Canada T5J 3Z3 Telex 037-3651 403/427-4368

TO WHOM IT MAY CONCERN

The Government of Alberta recognizes that tourism is a major economic factor in the Province. Certain facilities developed by the Provincial Government have the potential to capitalize on the growth of tourism and function as a tourism generator. Such a facility is the Remington - Alberta Carriage Centre Museum in Cardston.

The following consultant's report examines the tourism impacts of the development of the museum. This Tourism Destination Resort Plan reviews the impact and relationship of this tourism generator to local and regional tourism frameworks. The plan assesses existing tourism resources, potential tourism markets, regional requirements and opportunities, economic impacts and the potential roles of various participating sectors.

It should be noted that this study was conducted by an independent consultant commissioned by Alberta Tourism and does not represent government policy nor any commitment to implementation at this time.

If you have any comments relative to the report please forward them to:

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Destination Planning Branch
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Edmonton, Alberta
T5J 3Z3

Additional copies of the report are available by contacting the above address, or by telephoning 427-2501.

Sincerely,

Bernard F. Campbell
Deputy Minister

TABLE OF CONTENTS

Page

EXECUTIVE SUMMARY i

1.0 INTRODUCTION 1

1.1 Background 1
1.2 Study Purpose 1
1.3 Report Format 1

2.0 CONTEXT 2

2.1 Regional Setting 2
2.2 The Remington Carriage Museum 2

3.0 DELINEATION OF STUDY AREA 4

4.0 INVENTORY OF TOURISM RESOURCES 5

4.1 Introduction 5
4.2 Tourism Services 6

4.2.1 Accommodation 6
4.2.2 Campgrounds 8
4.2.3 Food Services 10
4.2.4 Small Communities 11

4.3 Tourism Attractions 11

4.3.1 Introduction 11
4.3.2 Man-Made Attractions 11
4.3.3 Natural Attractions 14
4.3.4 Events 15

4.4 Tourism Infrastructure 15

4.4.1 Municipal Servicing Constraints 15
4.4.2 Community Recreational Facilities 16
4.4.3 Transportation Network 17

4.5 Tourism Programs 18

4.5.1 Introduction 18
4.5.2 Cardston Community Tourism Action Plan 18
4.5.3 The Alberta Main Street Programme 18
4.5.4 Chinook Country Tourist Association Marketing Plan . 19

4.6 Summary 19

continued/...

TABLE OF CONTENTS (Continued)

Page

5.0 TOURISM MARKET ASSESSMENT 22

5.1 Travel Patterns 22

5.1.1 Chinook Country Zone Tourist Market 22
5.1.2 Waterton Lakes/Glacier National Parks 23
5.1.3 Ports of Entry 24

5.2 Visitor Profiles 25

5.2.1 Chinook Country 25
5.2.2 Waterton Park 26

5.3 Major Southern Alberta Attractions 27
5.4 Remington Carriage Museum Visitation Projection 27

5.4.1 Development Proposal Projections 27
5.4.2 Revised Projections 28

6.0 TOURISM DEVELOPMENT OPPORTUNITIES 30

6.1 Introduction 30
6.2 Assessment of Current Level of Supply 30

6.2.1 Infrastructure 30
6.2.2 Services 32
6.2.3 Attractions 34

6.3 Tourism Development Opportunities 35
6.4 Destination Resort Opportunities 36

7.0 ECONOMIC IMPACT OF REMINGTON CARRIAGE MUSEUM 38

7.1 Introduction 38
7.2 Inputs 38
7.3 Income and Employment Impacts 39

APPENDIX A: Bibliography
APPENDIX B: Contacts
APPENDIX C: Tourism Services and Attractions

EXECUTIVE SUMMARY

INTRODUCTION

BACKGROUND

With the increasing growth of tourism, and its recognition as a major economic factor in the Province, a number of recent tourism initiatives have been implemented by the Government of Alberta. One of these new initiatives involves the identification and development of a series of tourism generators throughout the Province over the next ten year period.

As each of these tourism generators are identified, there is a need to determine the impact and relationship of the facility within the local and regional tourism frameworks. In order to assess this impact, it will be necessary to prepare a destination plan for each identified tourism generator. Accordingly, in January of 1988, the IBI Group was retained to generate a Destination Plan for the Remington Carriage Museum.

STUDY PURPOSE

The purpose of the Destination Plan is twofold:

1) to determine the regional context of the facility; its impact on the region and potential tourism opportunities that could be created by its development; and

2) to determine the site requirements, and adjacent tourism resort opportunities, if any, required by the development of the generator.

CONTEXT

The Remington Carriage Museum is located within the Town of Cardston in Southwest Alberta. The Town, with a population of 3,500, is approximately 35 km north of the U.S. border on Highway 2. The Remington Carriage Museum is a proposed 65,000± sq. ft. interpretive facility located on an approximately 6.5 hectare site next to scenic Lees Creek. The Museum will include the private carriage collection of Mr. Don Remington, along with carriages from the Provincial Museum of Alberta, the Reynolds Alberta Museum and the Glenbow Alberta Institute Museum. Architectural drawings are now being completed for the facility, which is planned to open in the Spring of 1992.

DELINEATION OF THE STUDY AREA

The study area encompasses the southern third of the Chinook Country Zone, and is defined by the provincial boundary to the south and west, by Highway 3 to the north, and by Highway 4 to the east. Exhibit 3-1 depicts the study area and regional context.

The study area is divided into primary and secondary economic impact areas. The majority of the identified development opportunities and long-term economic benefits generated by the operation of the Remington Carriage Museum are expected to be concentrated in the primary area. Although considerable economic benefits are expected to accrue to the secondary area - particularly in the near term - their impact will be more diffuse, and will consequently afford fewer new development opportunities. The primary/secondary economic impact area boundary is also depicted in Exhibit 3-1.

INVENTORY OF TOURISM RESOURCES

A comprehensive inventory of tourism resources within the primary and secondary impact zones was undertaken including:

- **Tourism Attractions** - Man-made features (i.e., cultural, historical resources), special events, (i.e., fairs, competitions) and natural features (i.e., lakes, scenic natural environments) that are of existing or potential interest to tourists.

- **Tourism Services** - Hotels, motels, campgrounds and restaurants.

- **Tourism Infrastructure** - The regional and inter-regional transportation network, the extent of urban utility servicing and community recreational facilities.

The inventory of tourism resources was compiled from secondary data sources, personal communications and a 3 day field visit.

Tourism Attractions

- Within the primary zone, the major tourism attractions are clustered within the Waterton Lakes National Park.

- Cardston presently has 3 historical attractions of regional importance and the Mormon Temple, which is a major attraction of national significance. Unfortunately the latter is currently under-utilized and under-promoted.

- The secondary area has a much higher concentration of tourism attractions, primarily within the Lethbridge and Fort Macleod areas.

- With the exception of Waterton Lakes National Park, the primary area is characterized by a lack of tourism attractions and activities.

Tourism Services

- In terms of fixed roof accommodation, there are a total of 409 rooms in the primary area, with 75% of the total in Waterton.

- Within the secondary area there are 1,226 rooms distributed among Pincher Creek, Lethbridge and Fort Macleod with 78% of this total in Lethbridge.

- With respect to campground accommodation, there are 1,004 campsites within the primary zone, with 79% of these located within Waterton. There are 163 sites in the immediate vicinity of Cardston, which constitutes 16% of the primary area total. There are an additional 600 campground sites within the secondary area.

- With respect to food services, there are 8 restaurants within Cardston with the majority of small size and offering average to below average quality and pricing. The only tourist-oriented facility within Cardston is the Cobblestone Manor, which is a slightly larger facility with the capacity to handle large groups in additional banquet rooms. The Manor itself is designated as a Provincial Historical Resource.

- The Waterton Townsite has 15 restaurants with a considerably broader range in cuisine and quality than found in Cardston.

Tourism Infrastructure

- The examination of tourism infrastructure included municipal servicing, community recreational facilities, transportation network and information network. The current deficiencies are detailed further on within the Executive Summary (Tourism Development Opportunities/Assessment of Current Level of Supply).

TOURISM MARKET ASSESSMENT

- Secondary data sources were utilized to review existing travel patterns and potential markets.

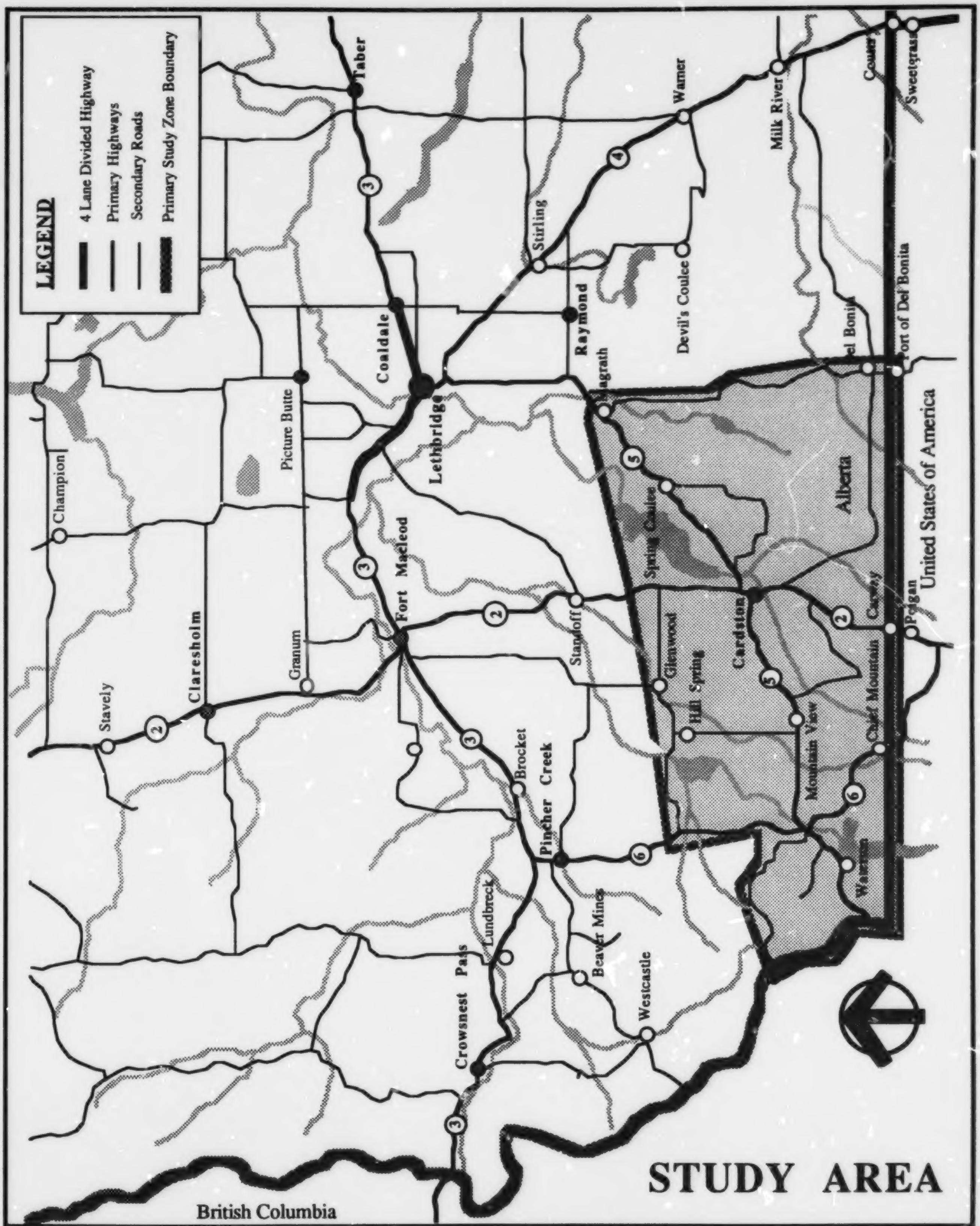
- Potential visitors to the Museum who are currently travelling in the following areas were enumerated:

AREA	ANNUAL VISITATION ESTIMATE
Glacier National Park	450,000
Waterton National Park	310,000
Chinook Country Zone	1,550,000
TOTAL	2,310,000

- The origins of visitors travelling in the areas noted above were determined as follows:

VISITOR ORIGIN	PERCENT
Alberta	41
Other Canada	11
USA	45
Other Countries	3
TOTAL	100

- Despite the predominance of USA visitor origins (caused by high visitation levels in Glacier National Park), the primary target market segment for the Remington Carriage Museum will be Cardston area destination and pass-through visitors, followed by other primary study area visitors and Southern Alberta residents.


LEGEND
4 Lane Divided Highway
Primary Highways
Secondary Roads
Primary Study Zone Boundary
Taber
Warner
Milk River
Coutts
Sweetgrass
Stirling
Devil's Coulee
Raymond
agrath
Coaldale
Lethbridge
Picture Butte
Champion
Fort Macleod
Granum
Claresholm
Stavely
Standoff
Spring Coulee
Glenwood
Hill Spring
Cardston
Mountain View
Chief Mountain
el Bonita
Port of Del Bonita
Alberta
United States of America
Carway
Piegan
Waterton
Brocket
Pincher Creek
Lundbreck
Beaver Mines
Westcastle
Crowsnest Pass
British Columbia
2
3
4
5
6

STUDY AREA

IBI
GROUP

REMINGTON CARRIAGE MUSEUM
Tourism Destination Resort Plan

EXHIBIT
3-1

- The available regional visitor profile data suggest that a significant proportion of the potential Museum visitors do not possess the income and attained education levels which are typically associated with visitors to historical attractions.

  This finding points to the need for:

  1. careful targeting of museum promotion;
  2. development of a broadly appealing interpretive program and special events; and
  3. monitoring visitation levels and visitors' characteristics after opening.

- Newly available data suggest that the Remington Development Proposal visitation projections may be overly optimistic: although those projections employed an average annual growth rate of 11%, the actual average rate of growth in visitation among the major interpretive centres in Southern Alberta is less than 1% per annum.

- Revised visitation projections for the facility are as follows:

OPERATING YEAR	VISITATION
1	150,000
2	165,000
3	170,000
4	175,000
5	180,000

TOURISM DEVELOPMENT OPPORTUNITIES

Assessment of Current Level of Supply

The current level of supply is assessed under the following 3 headings: infrastructure, services and attractions.

- **Infrastructure**

Utilities

- There are adequate levels of utility servicing throughout the region. In the primary zone communities of Cardston, Magrath and Waterton, utility servicing systems do not pose constraints to additional development. Development in Waterton is severely constrained by the limited landbase within the Townsite.

Transportation Network

- The transportation network within the region is generally good with proposed upgrading programs addressing localized deficiencies. The planned upgrading of Secondary Highway 501, from Highway 4 to Cardston, will significantly enhance the tourist traffic potential.

- Given the narrow and unsurfaced shoulder conditions on most of the highways throughout the region, the addition of "turn-outs" in selected locations would greatly improve conditions for tourist traffic, particularly over-sized vehicles and trailers.

- Current poor intersection conditions necessitate the construction of a "turn-out" at the intersection of Highways 2 and 5.

Tourist Information/Signage

- The lack of a coordinated tourism signage program is a deficiency of significant proportions and is an impediment to full realization of tourism potential, not only in the Cardston region, but throughout the Province. It should be noted that there is no tourism signage along U.S. Highway 89, which is the major port of entry to the Cardston region. Further, directional signage within the region itself is inadequate. Without a comprehensive signage program, the tourism attractions and services within the region will remain a well kept secret. The Cardston CTAP Study identifies the need for a signage program and has identified specific action steps to be taken by the Cardston Tourism Committee. It is our contention that this matter is better addressed at the Zone or Provincial level.

- The Remington Carriage Museum, by virtue of its locational characteristics, will function not only as an attraction in its own right but as a regional distributor of visitor traffic. This critical function must not be under-estimated in the conceptualization and delivery of tourism information services at the museum. It is recommended that strong consideration be given to allocating additional space as well as providing as dynamic and stimulating a program as possible (for example, use of state-of-the-art, attention grabbing techniques which might include three dimensional mechanical models, sophisticated audio-visual techniques and other interactive modes).

- The current Alberta Tourism information centre within St. Mary's is in need of upgrading, both in terms of the size of the facility and the size and location of the site. A larger site on the east side of Highway 89 at the junction of Going to the Sun Highway and U.S. Highway 89 would certainly enhance its functional efficiency.

Brochure/Advertising

- The need for high quality brochure material and the "packaging" of attractions and a targetted advertising strategy has been adequately addressed in the recently published Chinook Country Tourism Association Marketing Plan and the Cardston Community Tourism Action Plan.

Recreational Facilities

- There appears to be an adequate level of community recreational facilities to provide recreational opportunities for tourists. The most apparent deficiencies are within Waterton; however, given its constrained land base there are limited opportunities to rectify the situation.

- **Services**

Hotels/Motels

- The primary study area has an excess capacity of approximately 2,500 hotel/motel room nights during the months of July and August. Assuming that 20% of the total number of visitors to the facility spend an additional night in the region, and assuming that 50% of the total annual visitation occurs during the months of July and August, the total excess peak period demand for fixed-roof accommodation is 3,075 room nights, with an average occupancy of two persons per room.

- With the assumptions employed, it is apparent that the available capacity of fixed-roof accommodation in the primary study area will not be sufficient to meet projected demand. However, it should be noted that off-peak occupancy levels are significantly lower, so that the off-peak over-supply situation will continue after the commencement of operations at the Remington Carriage Museum. Thus, the construction of additional accommodation units may not be financially feasible in the near term.

- Notwithstanding the surplus of supply, accommodation within the region - with the exception of selected facilities within Waterton and the secondary zone - is not of adequate quality. While price sensitive demand is being served, tourists who are seeking a higher quality experience will tend to bypass the area. Unfortunately, the low level of off-season visitation reduces the financial viability of higher amenity types of facilities.

- There is some scope to improve existing facilities within the primary zone. In addition, there is a good opportunity for the creation of more specialized accommodation products which offer unique experiences, i.e., bed and breakfast, guest ranches, etc.

Campgrounds

- Utilizing the methodology outlined in the previous section, with an average occupancy of 2.5 persons per site, it is calculated that the operation of the Remington Carriage Museum will result in additional demand for approximately 840 campsite nights during the peak period of July and August. During the same period, the excess capacity in the primary area exceeds 20,000 campsite nights. Thus, there is no requirement for the provision of additional campsites.

- However, from a qualitative standpoint, there is considerable latitude for upgrading existing facilities, i.e., provision of additional hook-ups, amenities and activities.

Restaurants

- Considerable scope exists for the provision of tourist-oriented food services. With the exception of Waterton and the Cobblestone Manor in Cardston, restaurants are not oriented to visitor requirements. A notable constraint with respect to restaurants in Cardston is that they do not have the capacity to handle large groups of visitors. In addition, the unavailability of alcoholic beverages will severely restrict Cardston restaurants' ability to capture a significant proportion of the visitor market.

- Good opportunities exist for the provision of unique eating experiences as well as seasonal specialty outlets such as ice cream and confections.

Retail Goods

- The wide variety of goods and services available in Lethbridge relative to other communities in the region is reducing the smaller community retailers' share of the market for DSTM (department store type merchandise). Although this reduced market share over time has led to some retail business failures in the region, a substantial excess of retail capacity remains. For this reason, increased tourism visitation generated by the Remington Carriage Museum will not require the development of new general retail outlets.

- However, it is probable that private sector opportunities in Cardston will be created for the provision of specialized, tourist-oriented retail outlets, i.e., sportswear, gifts/souvenirs, books/magazines, authentic crafts, etc.

Automobile Service

- Cardston and the other towns in the study area offer a variety of independent and manufacturer-affiliated major service facilities, in addition to a large number of fuel and minor service outlets. It is therefore anticipated that development and operation of the Remington Carriage Museum will not require additional automobile service facilities.

- **Attractions**

- With the exception of Waterton Lakes National Park, the primary area has a limited number of attractions. Within Cardston, the Mormon Temple has the potential to become a major attraction; however, the Visitor Centre is currently under-utilized and under-promoted. The addition of the Remington Carriage Museum will be a significant enhancement to the region.

- The secondary area, including Lethbridge, Fort Macleod and Pincher Creek derives benefits from a clustering of attractions and contains the highest concentration of attractions within the Chinook Country Tourism Zone.

- Notwithstanding the addition of the Remington Carriage Museum, the secondary area will continue to exert a strong "pull" on visitors to the primary zone.

- Therefore, it will be necessary for the attractions in the immediate Cardston area to cooperatively develop packaging and promotional initiatives. At the same time, packaging and joint promotional efforts will benefit the entire zone.

- Achieving a critical mass of attractions within the primary zone will require a number of initiatives including:

  - enhancement of existing attractions;

  - packaging of existing attractions;

  - addition of attractions/activities; and

  - marketing and management of existing and proposed attractions.

- There is also a notable lack of activities, particularly night time activities, within Cardston itself. This deficiency will cause a loss of large numbers of museum visitors to other centres with an associated loss of potential accommodation and related expenditures. There is a requirement for the addition of attractions/activities/events that will encourage museum visitors to either extend their day use activities, stay over night or plan a return trip.

- With respect to activities/attractions, there is a major opportunity for staging equestrian-related activities and events at the Remington Carriage Museum. These could include;

  - heavy horse pulling contests;
  - trail riding club meets;
  - horse drawn fire wagon contests; and
  - show jumping, dressage and other related activities.

- A variety of ongoing events is critical to maintaining repeat visitation, as well as attracting visitation during the shoulder and off-peak seasons.

Tourism Development Opportunities

- Evolving from a synthesis of data from the tourism inventory, the market assessment and the assessment of the quality and quantity of existing tourism services, tourism development opportunities are detailed in the accompanying matrices. Potential opportunity types are briefly described; where possible, specific locations are detailed along with operating sector/agency responsibility and priority with respect to implementation. Priority has been ranked from 1 to 5, with 1 being the highest priority.

Destination Resort Opportunities

- The family vacation destination resort plan, a concept program of Alberta Tourism, was identified as a potential private sector opportunity for Cardston. The typical resort, as envisioned by Travel Alberta, would serve as a "visitor destination", providing complete services for tourists, including overnight facilities and recreational facilities.

- Two potential sites were identified within the Town; one immediately adjacent to the tourism generator facility and the other to the south, just outside the current Town boundary.

- The first site is municipally-owned river valley land adjacent to the municipal campground along Lees Creek. The scenic location, immediate proximity to the Remington Carriage Museum and the existing facility development (including playing fields, tennis courts, picnic sites and outdoor swimming pool) make this a very desirable area for the location of a vacation destination resort. Further, the location of the Cardston Golf Course, situated immediately to the south along Lees Creek enhances the attractiveness of this location. One strategy envisions the Municipality retaining ownership to the lands and leasing out the operation of the family destination resort to a private operator.

- The second site comprises approximately 100 acres of privately-owned land located south of and immediately adjacent to the Town boundary. Although not located adjacent to the Remington Carriage Museum site, there is a natural tie-in of this potential site through the Lees Creek open space system.

- The owners of the 100 acre parcel have indicated some interest in developing their lands for a tourism-oriented use; some preliminary feasibility work has been undertaken for the site in the form of an engineering study, which included contours, slope analysis and servicing potential.

- There is a general lack of high quality campground capacity within the primary zone. A comprehensive development as described in this location would significantly augment the existing tourism base and would greatly benefit from its close relationship with the Remington Carriage Museum facility.

ECONOMIC IMPACT

- Average day-use visitor expenditures are estimated at $8.00, and average overnight visitor expenditures are estimated at $30.00.

- The incremental inputs for the calculation of economic impacts are as follows:

- Capital Expenditures	$9,015,000
- Annual Operating Expenditures	$795,000
- Annual (first year) Visitor Expenditures	$1,860,000

- The province-wide economic impact of the construction of the Museum is calculated at $5,800,000 in household income, or 200 person-years of employment.

- The province-wide annual economic impact of the ongoing operation of the Museum is estimated at $3,600,000 in household income, or 150 person-years of employment.

- Although it is difficult to determine the primary impact zone's share of the identified benefits, it is probable that the zone will capture the majority of the employment generated by the construction and operation of the Remington Carriage Museum. With a 50% capture rate, the construction of the facility would provide 103 person-years of employment in the zone, and add some $2,900,000 to local household income.

- In addition to the substantial one-time benefits generated from capital expenditures, the primary impact zone will capture the majority of the economic benefits from the on-going operation of the facility. With a 70% capture rate, the visitor expenditures and facility operation expenditures would generate 109 person-years of employment annually in the zone, and add some $2,500,000 to local household income each year.

TOURISM DEVELOPMENT OPPORTUNITIES

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
INFRASTRUCTURE					
Information	• Comprehensive information/directional signage program - both external to region and within primary and secondary zone. Includes signage to list/highlight some of the major attractions as well as directional signage within the region. Signage should employ consistent graphic format. • More comprehensive information signage might take the form of a roadside pull-off with large-scale map and additional detail on individual attractions. Site could also include picnic benches, landscaping, etc.	• St. Mary, Montana junction of "Going to the Sun" Highway & U.S. Highway 89. • Junction of U.S. Highway 89 & 17. • Strategic locations within primary and secondary zone, Waterton in particular. • Preferred location would be immediately north of Carway.	Travel Alberta	1	
Information	• Upgrading of current Travel Alberta information booth in St. Mary. Increase size of facility; move facility to east side of Highway 89.	• St. Mary, Montana junction of "Going to the Sun" Highway and U.S. Highway 89.	Travel Alberta/Chinook Country Tourist Association	2	
Information	• Brochure of attractions/tours within primary and secondary zone.	-	Joint effort between Travel Alberta, Chinook Country Tourism Assoc., Cardston Tourism Board	2	
Information	• Major identity feature at entrances to Cardston - could take form of an elevated carriage/prairie schooner	• At intersection of Highways 5 and 2, at north end of Town and at southern entry	Cardston Tourism Board/ Chamber of Commerce	2	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
	in a landscaped setting. Reinforces identity and theme of tourism attraction as well as providing photo opportunity.	to Town along Highway 2.			
Highways/Roads	• Upgrading of selected roads, widening of shoulders, inclusion of turn-outs.	• Highway 2 & 5, intersection of 2 & 5. • Other selected locations throughout region.	Alberta Transportation	2 - 3	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
SERVICES					
Restaurants	• Opportunities for upgrading of existing restaurants including decor and menu. Expansion of facilities to allow for tour bus groups.	• Primary opportunities in Cardston and Waterton. • Some possibilities within rest of primary zone.	Private	1 - 2	• Requirement for existing food services to tap expected increased visitation.
	• Opportunities for creation of unique eating experiences, themed restaurants.		Private	2 - 3	
	• Carriage ride from museum to restaurant in order to maximize tourism experience and provide linkage with carriage theme.	• Within Cardston or to immediate outskirts of town.	Private	3	
	• Creation of unique and specialty menu items "Carriage Driver's Lunch" similar to "Ploughman's Lunch".			3	
	• Opportunities for seasonal specialty outlets, i.e., ice crean and confections.	• Downtown Cardston.	Private	2	
Accommodation	• Opportunities for more unique accommodation catering to increased seasonal traffic. Bed and breakfast variety accommodation in older homes, farm houses, etc.	• Within primary area - scenic location with natural amenities preferred, western part of primary zone, mountain views.	Private	1 - 2	
	• Opportunity for guest ranch accommodation catering to longer stays but still aimed at seasonal market. Provides continuity in terms of equestrian theme.	• Within primary area.	Private	1 - 2	• Would require more detailed market studies to determine feasibility.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
Campgrounds - St. Mary's Reservoir	• Upgrading of environment through extensive tree planting program to provide screening and shelter.	• Adjacent to day use area and other activity areas.	Alberta Environment	3	• Required to provide high quality recreational experience for regional users.
Movie Theatre	• Re-opening of existing movie house in downtown Cardston to provide night time activity for visitors.	• Downtown Cardston.	Private	2	
Amusements	• Miniature golf, amusement/entertainment complex, again to broaden base of tourist activities.	• Preferred location adjacent to or in conjunction with Municipal campground.	Private	2 - 3	
Specialty Merchandise	• Opportunities for provision of specialty and tourist-oriented merchandise, i.e., gifts and crafts, fine art, specialty clothing items, i.e., western. • Opportunities for specialty outlets, i.e., art gallery, specialty book store, antique store or combinations of the same.	• Cardston and Waterton with some opportunities within the secondary impact zone.	Private	3 - 4	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
ATTRACTIONS					
Summer Theatre	• Prime opportunity to provide summer theatre as a means of supplementing night time activity. Matinee performances catering to tour buses.	• Civic Centre, Cardston.	Private	2	• Municipality or Tourism Board to tender.
	• A number of possibilities exist with respect to fare - western themed as in Fort Steele, repertory group to perform light entertainment (musical comedies, etc.). Dinner theater is another possibility, particularly if venue is located at the Civic Centre which has a full service kitchen.				
Carriage Rides/ Tours	• Carriage tour of Cardston's historic landmarks.	• Staged from Remington Carriage Museum.	Friends of the Remington, leased to private operator.	2	
	• Carriage ride along extended trail system, i.e, stage coach ride along Lee Creek.	• Staged from Remington Carriage Museum.			
	• Extended trail ride out into rural area.	• Staged from Remington Carriage Museum.			
	• Small van tours throughout primary area, 1 and 2 hour durations to visit local/regional attractions.	• Staged from Remington Carriage Museum.	Friends of the Remington, leased to private operator.	2	• Requires packaging.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
Programming & Interpretive Considerations	• Interactive exhibits, simulated rides, actual rides in horse-drawn conveyances, demonstrations and a variety of special events are programming essentials, which along with creative target marketing will be the critical factors in ensuring the facility's success.	• Improvements to programming at facilities listed, tours could be staged from the Carriage Museum.	Alberta Culture, Friends of the Remington	1	• The travelling public expects a high quality, interactive interpretive experience. To maximize the potential first time and repeat visitation - particularly in the shoulder and off-season, the Remington program must emphasize interaction, activity and special events. A multi-media production and static exhibits are not sufficient.
Remington Carriage Museum	• Opportunities for the inclusion of revenue generating activities within the Carriage Museum including:				
	Simulator: - Number of possibilities exist with respect to theme - one envisions a stage coach ride/chase.	• Interpretive Gallery	Friends of the Remington, Alberta Culture, lease to private operator.	3	
	Photography: - Opportunity for photography booth which might include period costume shots around various types of carriages.	• Space leased to operator, either within main building or somewhere on the site. Alternatively, the studio could be established within the downtown, although the museum is the obvious first choice in terms of a location.	Friends of the Remington, Remington, lease to private operator.	3 - 4	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
Remington Carriage Museum (continued)	Video Postcards: - This could be operated in conjunction with the photography studio. Essentially it allows the visitor to purchase a cassette to send home with a short video and audio message featuring the visitor.	• Museum grounds.		3 - 4	
Interpretation	Mormon Interpretation • Cardston and district was settled by the Mormons; a cultural/historical theme of national/international interest. Considerable opportunity exists to enhance and extend this theme's interpretation to the visiting public. • Consequently, opportunities exist for enhancing existing interpretation facilities and programming, and also for extending interpretation of Mormon settlement into the surrounding district through self-guided or guided auto/	• Improvements to programming at facilities listed, tours could be staged from the Carriage Museum.	Friends of the Remington, Cardston Tourism Community, Mormon Community	2 - 3	• In Cardston, the Card House, the Courthouse Museum and the Visitor Reception Centre at the Mormon Temple all deal with aspects of the Mormon story, but not within a coherent, thematic structure or consistent manner. In none of these facilities does the visitor get a holistic view of the Mormon settlement and activities in Southern Alberta.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
Interpretation (continued)	mini bus tours. For example, the key role the Mormons played in establishing the St. Mary's irrigation system as represented in the Kimball Headworks and other remains of the original St. Mary's system - the first and oldest of their kind in Alberta.				
	Other Cultural/Historical Interpretation • Other cultural/historical sites, interpretive themes and opportunities exist in the region. For example, the Northwest Mounted Police, whiskey trade and Native reserve and pre-reserve sites. Some of the sites are of Provincial and national significance. Cardston and district also contains a number of geological, biological and ecological sites/areas of Provincial and national significance.	• Primary and secondary zone. • Again, tours could be staged from the Remington Carriage Museum.	Cardston Tourism Board/ Travel Alberta	4 - 5	• Co-operating local association (e.g., Friends of the Remington) could offer guidebooks and souvenir publications including other attractions.

1.0 INTRODUCTION

1.1 BACKGROUND

With the increasing growth of tourism, and its recognition as a major economic factor in the Province, a number of recent tourism initiatives have been implemented by the Government of Alberta. One of these new initiatives involves the identification and development of a series of tourism generators throughout the Province over the next ten year period.

As each of these tourism generators are identified, there is a need to determine the impact and relationship of the facility within the local and regional tourism frameworks. In order to assess this impact, it will be necessary to prepare a destination plan for each identified tourism generator. Accordingly, in January of 1988, the IBI Group was retained to generate a Destination Plan for the Remington Carriage Museum.

1.2 STUDY PURPOSE

The purpose of the Destination Plan is twofold:

1) to determine the regional context of the facility; its impact on the region and potential tourism opportunities that could be created by its development; and

2) to determine the site requirements, and adjacent tourism resort opportunities, if any, required by the development of the generator.

1.3 REPORT FORMAT

The following report details the findings of the Remington Carriage Museum Destination Resort Plan. The report is divided into 7 sections as follows:

1.0 Introduction
2.0 Context
3.0 Delineation of Study Area
4.0 Inventory of Tourism Resources
5.0 Tourism Market Assessment
6.0 Tourism Development Opportunities
7.0 Economic Impact

2.0 CONTEXT

2.1 REGIONAL SETTING

Exhibit 2-1 depicts the regional context of the Remington Museum, which is located in the Town of Cardston in southwest Alberta. The Town, with a population of 3,500, is approximately 35 km north of the U.S. border on Highway 2. The City of Calgary is a 2 hour (210 km) drive north of Cardston on Highway 2, and Waterton National Park is a half-hour drive (45 km) west on Highway 5.

Cardston is within the Chinook Country Tourist Zone. This Zone's approximate boundaries are Calgary to the north, the B.C./Alberta border to the west, the U.S. border to the south, and near Highway 36 (Brooks, Taber) to the east. Other urban areas within the Zone include Lethbridge, Fort Macleod, Pincher Creek, Crowsnest Pass, Claresholm and High River.

2.2 THE REMINGTON CARRIAGE MUSEUM

The Museum will be a 65,000 sq.ft. interpretive facility located in the Town of Cardston. The Museum will include the private carriage collection of Mr. Don Remington; carriages from the Provincial Museum of Alberta, the Reynolds Alberta Museum and the Glenbow-Alberta Institute Museum will also be displayed at the Remington Museum.

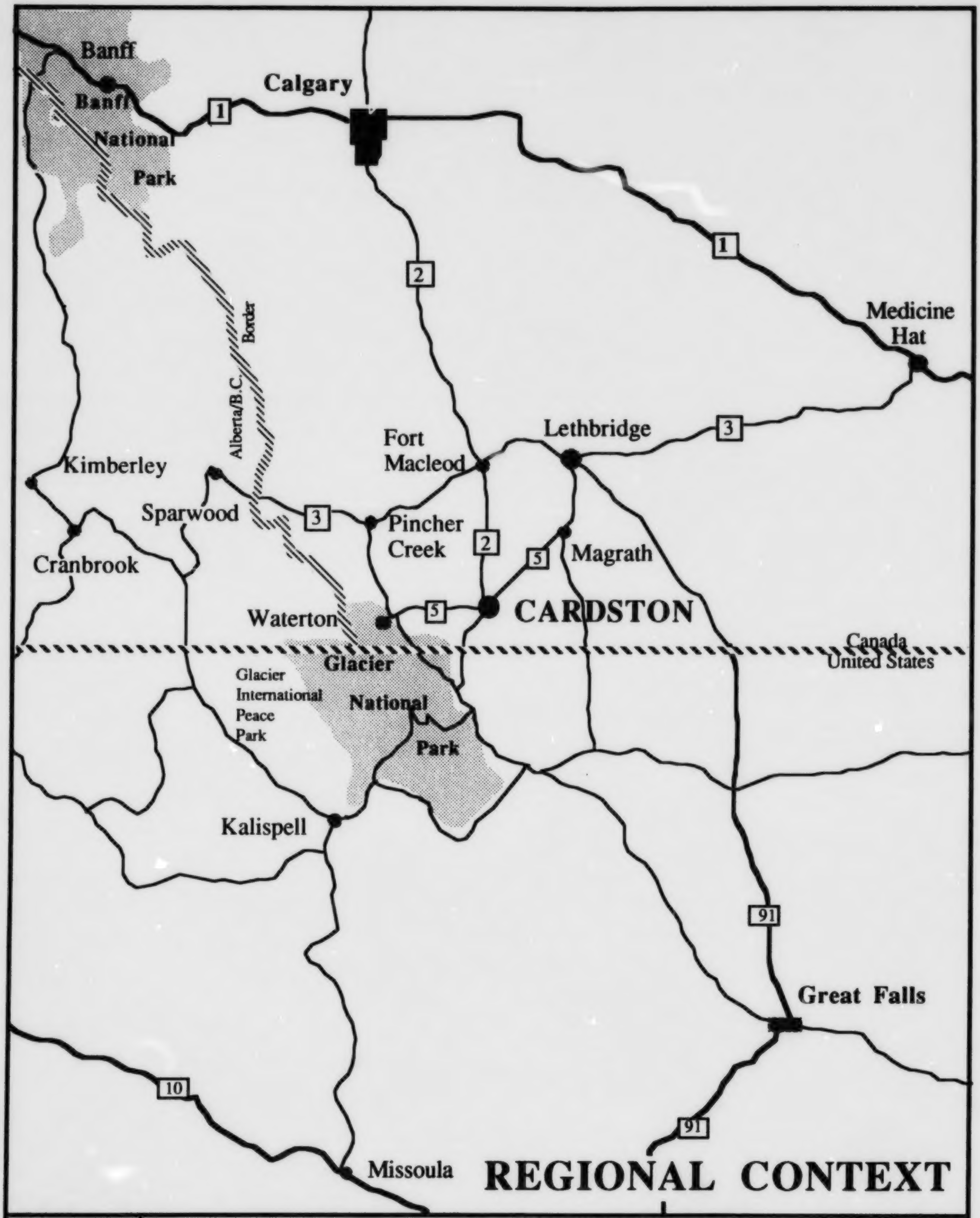
A site comprising approximately 6.5 hectares has been dedicated to the Province of Alberta for the development of the Museum. Direct access is available via 6th Avenue or 2nd Street West. The site is located next to scenic Lees Creek and the municipal campground. To the north of the site is a single-family residential area, while to the south, across the creek, is the downtown core. Two motels on Highway 2 are within a short walking distance of the site. Currently on the site are several residential dwellings and a vacant school building.

The interpretive concept of the Museum, as described in the 1986 Development Proposal, will focus on the comprehensive story of horse-drawn vehicles of the mid-nineteenth to early twentieth centuries, particularly those used in southern Alberta during the settlement area. The Museum will be open on a year-round basis and should be of interest to casual visitors, museum-goers, transportation enthusiasts, special interest groups and educational groups.

The Museum will include state-of-the-art display areas, ongoing audio-visual programs, demonstrations of special carriage-related skills, active use of carriages and special events. Facilities will include a tourist information centre, audio-visual theatre, presentation galleries, workshops, outdoor demonstration area, outdoor special events area, an administrative/education centre, gift shop/snack bar and site landscaping including picnic areas and a trail system for carriages.

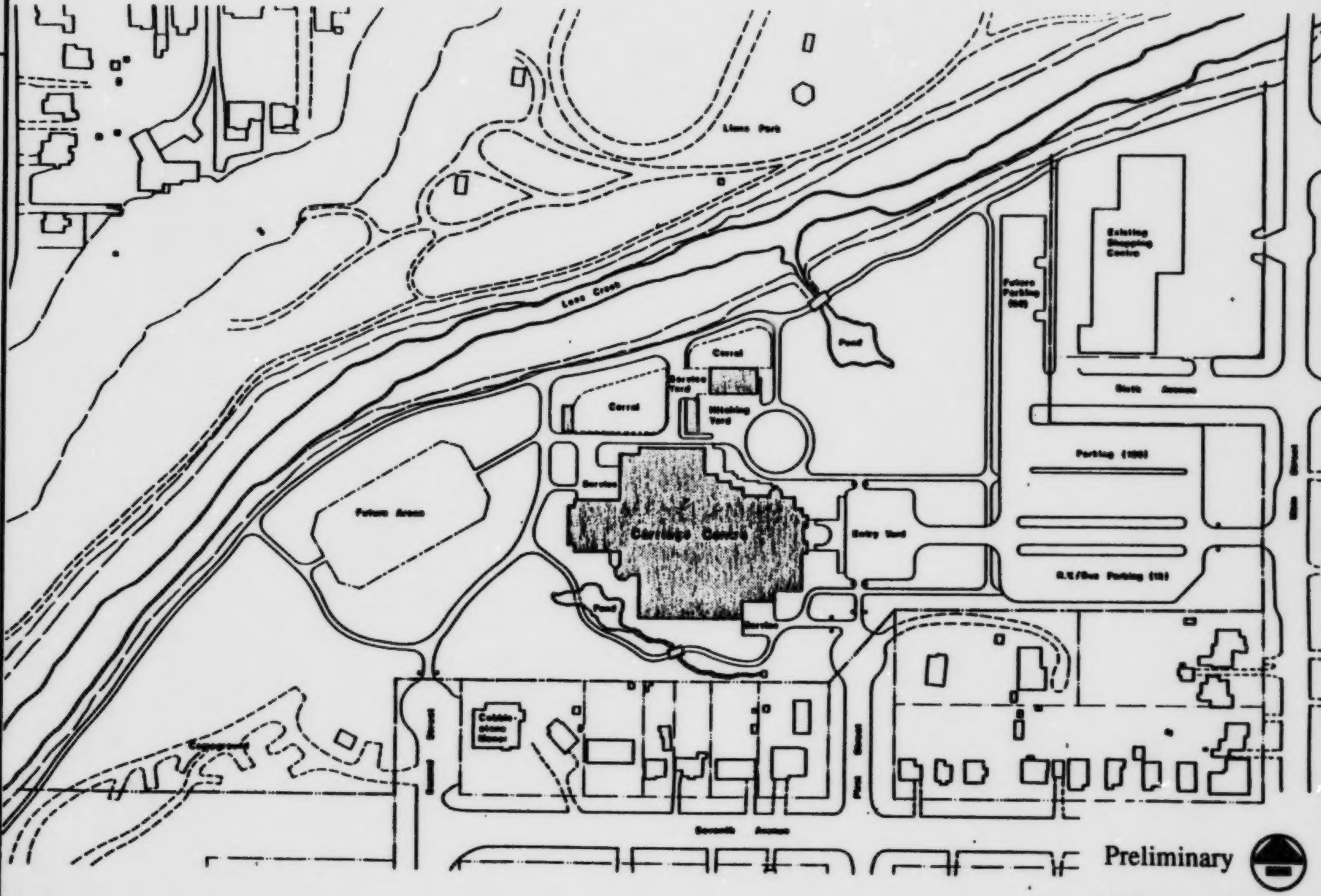
Architectural drawings are now being completed for the facility which is planned to open in the Spring of 1992.

The accompanying exhibits illustrate the preliminary site and building plans for the Museum along with the proposed elevation treatments.


Banff
Calgary
Banff National Park
1
2
Alberta/B.C. Border
Medicine Hat
Lethbridge
3
Fort Macleod
Kimberley
Sparwood
Pincher Creek
Magrath
5
Cranbrook
Waterton
CARDSTON
Canada
United States
Glacier International Peace Park
Glacier National Park
Kalispell
91
Great Falls
10
Missoula

REGIONAL CONTEXT

IBI GROUP	REMINGTON CARRIAGE MUSEUM Tourism Destination Resort Plan	EXHIBIT 2-1


Lions Park
Lees Creek
Pond
Existing Shopping Centre
Future Parking (60)
Sixth Avenue
Parking (100)
R.V./Bus Parking (15)
Corral
Service Yard
Hitching Yard
Carriage Centre
Entry Yard
Service
Future Arena
Campground
Cobblestone Manor
Seventh Avenue

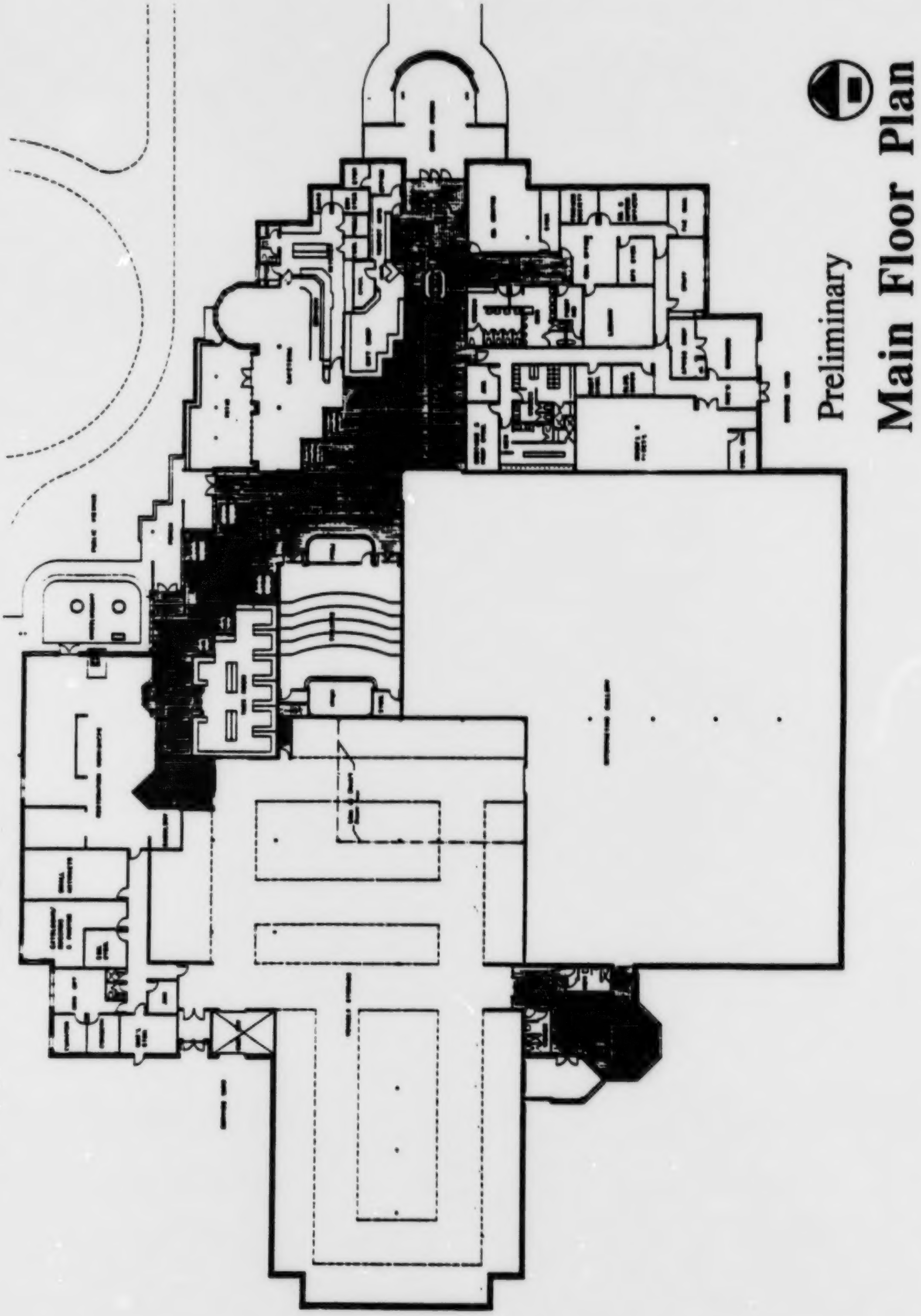
Preliminary

Site Plan

IBI
GROUP

REMINGTON CARRIAGE MUSEUM
Tourism Destination Resort Plan

EXHIBIT
2-2



Preliminary

Main Floor Plan

IBI
GROUP

REMINGTON CARRIAGE MUSEUM

Tourism Destination Resort Plan

EXHIBIT
2-3

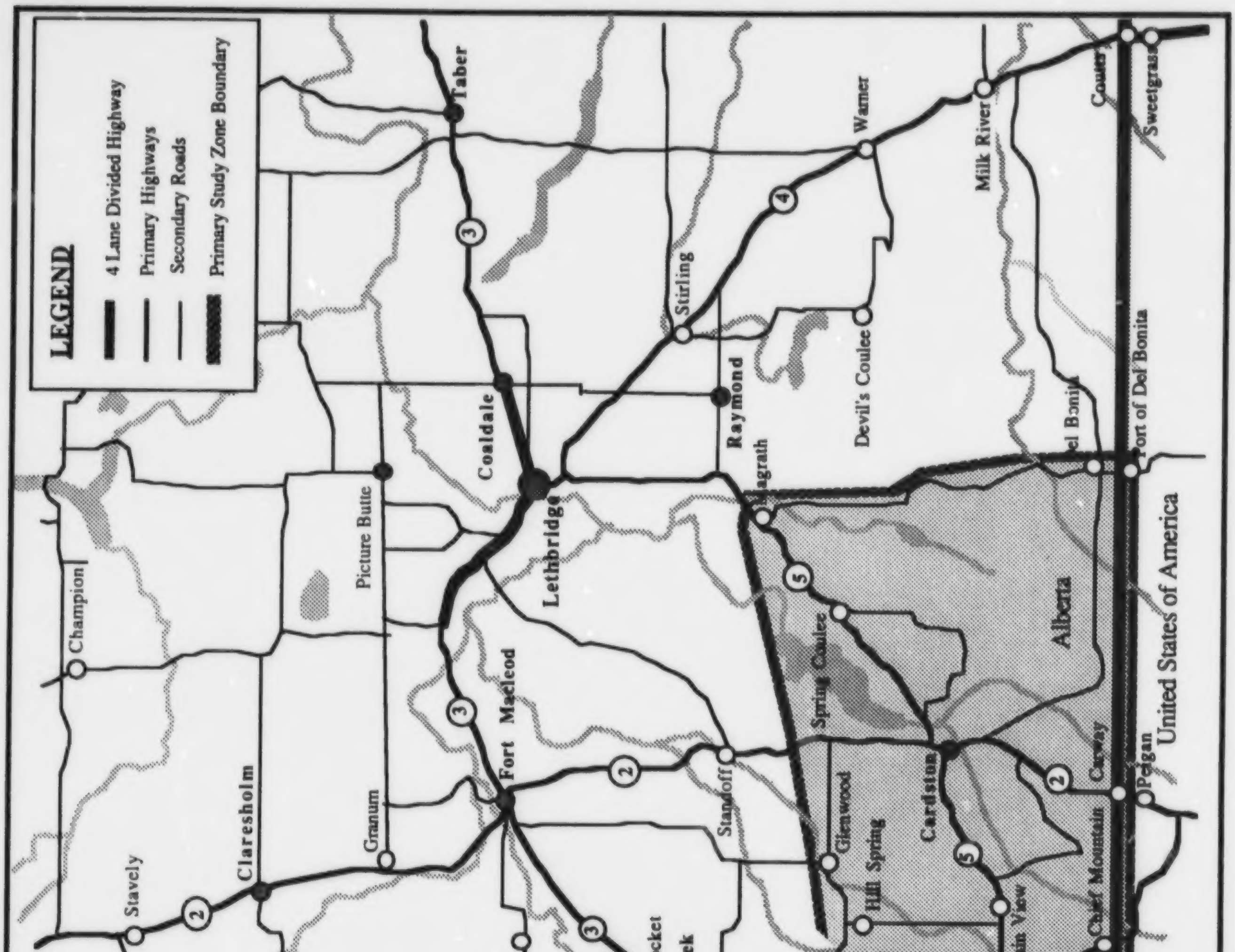
3.0 DELINEATION OF STUDY AREA

The study area encompasses the southern third of the Chinook Country Zone, and is defined by the provincial boundary to the south and west, by Highway 3 to the north, and by Highway 4 to the east. Exhibit 3-1 depicts the study area and regional context.

The study area is divided into primary and secondary economic impact areas. The majority of the identified development opportunities and long-term economic benefits generated by the operation of the Remington Carriage Museum are expected to be concentrated in the primary area. Although considerable economic benefits are expected to accrue to the secondary area - particularly in the near term - their impact will be more diffuse, and will consequently afford fewer new development opportunities. The primary/secondary economic impact area boundary is also depicted in Exhibit 3-1.

Delineation of the primary impact zone was based on the consideration of a number of factors, including regional service centre trading areas; the distribution of natural, cultural and other tourism resources; geographic features; and travel patterns. The primary economic impact zone includes Cardston's population-weighted area of economic influence (service area), relative to other similar sized service centres. It also includes Waterton Lakes National Park, which is the major tourism node in the region and is in close proximity to Cardston. The trade area boundary was subsequently rationalized to coincide with the road network.

It should be noted that the City of Lethbridge exerts a considerable influence over the primary zone, by virtue of its size and relative number of tourist attractions. As tourism resources are developed in the primary zone, this dominance will decrease.


LEGEND
4 Lane Divided Highway
Primary Highways
Secondary Roads
Primary Study Zone Boundary
Taber
Warner
Milk River
Coutts
Sweetgrass
Stirling
Devil's Coulee
Raymond
Magrath
Coaldale
Lethbridge
Picture Butte
Champion
Fort Macleod
Del Bonita
Port of Del Bonita
Alberta
United States of America
Spring Coulee
Cardston
Carway
Piegan
Standoff
Glenwood
Hill Spring
Mountain View
Chief Mountain
Waterton
Granum
Claresholm
Stavely
Brocket
Pincher Creek
Lundbreck
Beaver Mines
Westcastle
Crowsnest Pass
British Columbia
2
3
4
5
6

STUDY AREA

IBI
GROUP

REMINGTON CARRIAGE MUSEUM
Tourism Destination Resort Plan

EXHIBIT
3-1

4.0 INVENTORY OF TOURISM RESOURCES

4.1 INTRODUCTION

The purpose of this section is to summarize the inventory of tourism resources in the primary and secondary areas of economic impact. The tourism resources are assets that attract tourists and serve their needs, including tourism attractions, tourism services and tourism infrastructure. These categories and definitions are based on those used in the Community Tourism Action Plan program manual of Alberta Tourism.

- **Tourism attractions** include man-made features (i.e., cultural, historical resources), special events (i.e., fairs, competitions) and natural features (i.e., lakes, scenic natural environments) that are of existing or potential interest to tourists. These constitute the reason(s) why tourists come specifically to an area or spend time in an area while passing through.

- **Tourism services** include hotels, motels, campgrounds and restaurants. The extent and quality of these services partially influences the tourist's decision to come to and/or stay in an area, and affect their overall experience of the area.

- **Tourism infrastructure** includes the regional and inter-regional transportation network, the extent of urban utilities servicing and community recreational facilities. As stated in the Community Tourism Action Plan booklet "the way people get to an area - and the basic utilities available to them on arrival - can affect a community's ability to attract tourists". The quality of the infrastructure also affects a community's ability to develop new attractions and services.

The inventory of tourism resources was compiled from secondary data sources, personal communications, and a three day field visit.

The secondary sources used include:

- Chinook Country Tourism Destination Area Study
  (MTB Consultants Ltd., 1984)

- Chinook Country Tourist Association Marketing Plan
  (Exceleration Corp., 1988)

- Cardston Community Tourism Action Plan (1988)
- The Alberta Main Street Program: Resource Team Report
  Cardston, Alberta (1988),
- Development Proposal: Remington Carriage Collection Interpretive Centre
  (1986)
- Facilities Programme: Remington Carriage Centre
  (R.J. Goodfellow Architects, 1988)
- 1988 Alberta Campground Guide/1988 Alberta Accommodation Guide
  (Alberta Hotel Association)
- Alberta Touring Guide (Travel Alberta)

Various public agency and private sector contacts were used to expand upon existing data, and/or supply new inventory data. A list of those persons contacted is provided in Appendix B. A three day field visit to the primary and secondary zones provided additional inventory information.

The balance of this section summarizes the tourism resources by the three defined categories. More detailed inventory tables for all resources identified under tourism services and attractions are provided in Appendix C.

4.2 TOURISM SERVICES

4.2.1 Accommodation

The inventory of hotels and motels is summarized in Exhibit 4-1 and depicted in Exhibit 4-2. In total, 1,635 rooms were identified in 35 establishments.

EXHIBIT 4-1

Fixed Roof Accommodation Summary

LOCATION	NUMBER OF MOTELS/HOTELS	NUMBER OF ROOMS	UNIT % OF STUDY AREA
Cardston	4	105	25%
Waterton	8	304	75%
Primary Area Total	12	409	100%
Pincher Creek	5	145	12%
Lethbridge	12	963	78%
Fort Macleod	6	118	10%
Secondary Area Total	23	1,226	100%

Cardston

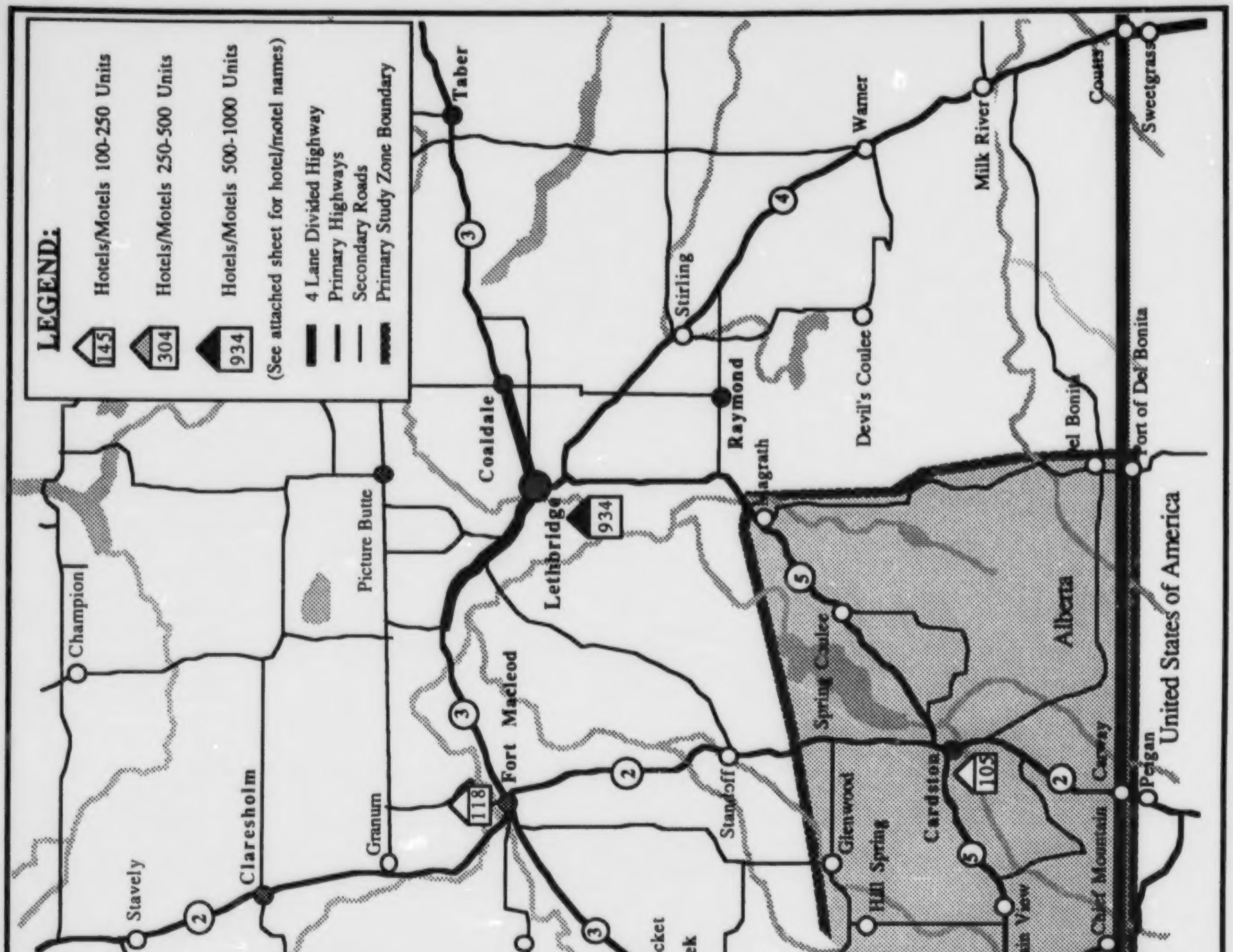
Three motels and one hotel with a total of 105 rooms are located in Cardston. The three motels are tourist oriented, while the hotel caters primarily to local longer term residents. The motels offer modestly priced, low amenity accommodations. Occupancy averages 50% to 60%, with peak season (July/August) occupancy ranging from 80% to 90+%, shoulder season (May, June, Sept., Oct.) from 30% to 65%, and off-season from 15% to 20%.

Tourists account for up to 90% of business during the peak season while shoulder and off seasons are oriented to business travellers and Temple users.

Waterton

Waterton Townsite is the other major service centre in the primary study area with eight motels/hotels totalling some 304 units. The accommodations are generally more expensive than in Cardston, and offer higher quality and levels of services/amenities.

From late June through early September, all of the hotels/motels operate at 100% occupancy. For the balance of the shoulder season occupancy ranges from 50-70%. Only one hotel, the Kilmorey Lodge, is open during the off-season, with occupancy of 30% to 40%.


LEGEND:
145 Hotels/Motels 100-250 Units
304 Hotels/Motels 250-500 Units
934 Hotels/Motels 500-1000 Units
(See attached sheet for hotel/motel names)
4 Lane Divided Highway
Primary Highways
Secondary Roads
Primary Study Zone Boundary
Taber
Coaldale
Lethbridge
934
Raymond
Stirling
Warner
Milk River
Coutts
Sweetgrass
Devil's Coulee
Del Bonita
Port of Del Bonita
Magrath
Spring Coulee
Alberta
United States of America
Cardston
105
Carway
Peigan
Glenwood
Hill Spring
Mountain View
Chief Mountain
Waterton
304
Standoff
Fort Macleod
118
Picture Butte
Champion
Granum
Claresholm
Stavely
Brocket
Pincher Creek
145
Lundbreck
Beaver Mines
Westcastle
Crowsnest Pass
British Columbia
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MOTELS/HOTELS

IBI
GROUP

REMINGTON CARRIAGE MUSEUM
Tourism Destination Resort Plan

EXHIBIT
4-2

No hotel/motel accommodations are available in any of the other villages in the primary study area. The only other accommodation facility is the Chateau Isabella in the hamlet of Beazer; it is fully booked by tour groups during the peak and shoulder seasons.

Secondary Study Area

The secondary area includes Pincher Creek, Lethbridge and Fort Macleod with 145, 963 and 118 motel/hotel units respectively. Together they account for 56% of the total Chinook Country Tourist Zone accommodation. These establishments are significant competitors with Cardston area facilities because they are less than one hour's drive from Cardston and on major transportation corridors.

4.2.2 Campgrounds

EXHIBIT 4-3

Campground Accommodation Summary

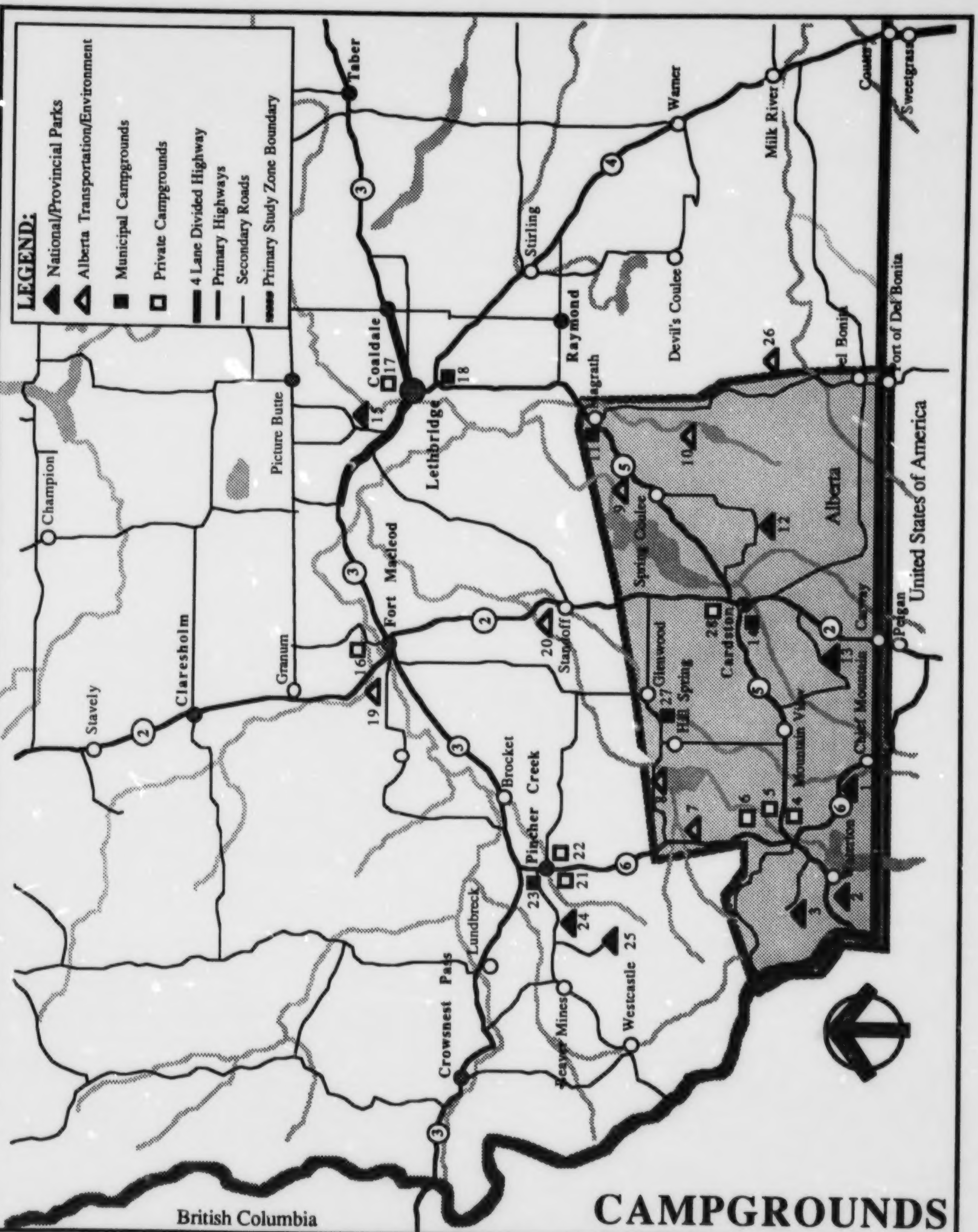
LOCATION	NUMBER OF SITES	% OF STUDY AREA
Primary Area		
Cardston	43	4%
Cardston Region	120	12%
Waterton	788	79%
Other Primary Area	53	5%
PRIMARY AREA TOTAL	1,004	100%
Secondary Area		
Lethbridge	202	33%
Pincher Creek	92	16%
Fort Macleod	130	21%
Other Secondary Area	176	30%
SECONDARY AREA TOTAL	600	100%

Exhibit 4-3 summarizes the inventory of campground sites, and Exhibit 4-4 depicts their locations. In total, some 1,600 campsites were identified in the study area.

KEY (FOR EXHIBIT 4-4)

CAMPGROUNDS/DAY USE SITES			
NAME	STATUS	MAP REF.#	# OF SITES
Primary			
Belly River	National Park	1	24
Townsite	National Park	2	129
Crandell Mountain	National Park	3	240
Crooked Creek	Private	4	75
Waterton Homestead	Private	5	70
Waterton Oasis	Private	6	250
Yarrow Creek	Alta. Transp.	7	8
Waterton Reservoir*	Alta. Environ	8	25 (est.)
St. Mary's Reservoir*	Alta. Environ	9	50
Jensen Reservoir*	Alta. Environ	10	25 (est.)
Jubilee Park	Municipal	11	15
Woolford	Provincial Pk	12	46
Police Outpost	Provincial Pk	13	30
Lees Creek	Municipal	14	26
Spring Glen	Municipal	26	30 (est.)
Secondary			
Park Lake	Provinical Pk	15	53
Daisy May	Private	16	120
Lethbridg KOA	Private	17	102
Henderson Lake	Municipal	18	100
Oldman River	Alta. Transp.	19	10
Waterton River	Alta. Transp.	20	4
Clelands Trailer Park	Private	21	12
Sleepy Hollow	Private	22	60
Pincher Creek	Municipal	23	20
Castle River	Provincial Pk	24	35
Beauvais Lake	Provincial Pk	25	85

* Day use sites which are used as campgrounds.


LEGEND:
National/Provincial Parks
Alberta Transportation/Environment
Municipal Campgrounds
Private Campgrounds
4 Lane Divided Highway
Primary Highways
Secondary Roads
Primary Study Zone Boundary
Taber
Warner
Milk River
Coutts
Sweetgrass
Stirling
Raymond
Devil's Coulee
Del Bonita
Port of Del Bonita
Coaldale
Lethbridge
Magrath
Picture Butte
Champion
Spring Coulee
Alberta
United States of America
Fort Macleod
Granum
Claresholm
Stavely
Standoff
Glenwood
Hill Spring
Cardston
Carway
Peigan
Mountain View
Chief Mountain
Waterton
Brocket
Pincher Creek
Lundbreck
Crowsnest Pass
Beaver Mines
Westcastle
British Columbia
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28

CAMPGROUNDS

IBI
GROUP

REMINGTON CARRIAGE MUSEUM
Tourism Destination Resort Plan

EXHIBIT
4-4

Cardston

Cardston has one municipal seasonally-operated campground of some 26 sites, with a planned expansion of 10 - 15 sites. The campground is adjacent to the proposed Remington Museum, and is used largely by pass-through and short-term destination visitors. There is also one private trailer park/campground located at the north end of Cardston.

Two year-round provincial parks totalling some 76 sites are located near Cardston. The larger, Police Outpost, has relatively low occupancy with occasional full weekends during the summer. The other, Woolford, has very low occupancy. Both parks' visitation is made up almost exclusively of Alberta-based visitors.

The St. Mary's Reservoir, northeast of Cardston, has a seasonal Alberta Environment-operated day use site, which is used as a campground. St. Mary's has a high level of occupancy on weekends, and caters exclusively to local and regional users.

Together, campgrounds in and around Cardston total about 146 sites. The appeal of these sites is reduced by the lack of utility hook-ups, which limits their ability to accommodate tourist recreational vehicles.

Waterton

The Waterton Park area has some 788 campground sites, evenly divided between Park and privately operated sites. There are three campgrounds in the Park and three near the Park entrance. These represent 75% of the sites in the study area and about 22% of the sites in the overall Chinook Country Tourist Zone.

The private campgrounds are several kilometres outside the Park gate and offer better on-site services and facilities. Two of the private campgrounds are open year-round, while the other (and the three Park campgrounds) are seasonal.

With respect to occupancy, the Park campgrounds are the preferred locations. The Townsite campground is the most popular, operating at 95% occupancy throughout its season, and 100% during July and August. The other Park campgrounds average 50% to 85% throughout the season. The three campgrounds located outside of the Park are primarily receiving overflow traffic from the Park. Occupancy ranges from 45% to 75% during the peak season with occasional occupancies of 100% on long weekends.

Other Primary Area

In the balance of the primary study area there are three other campground areas including one at Magrath, one near Twin Butte, and one near Hill Spring. Together, these campgrounds total some 50 sites.

Secondary Area

Campgrounds in the secondary area include a total of 424 campground sites: 202 in Lethbridge, 92 in Pincher Creek and 130 in Fort Macleod. The balance of the secondary area includes Beauvais Provincial Park and Castle River Provincial Recreation Area, both near Pincher Creek and Park Lake Provincial Park, near Lethbridge.

4.2.3 Food Services

Cardston

There are eight restaurants in Cardston. Seven of these range in size from approximately 10-25 tables, with most being at the smaller end of the scale, and all offering average to below average quality and pricing.

The eighth restaurant in Cardston is the Cobblestone Manor which is a slightly larger facility of some 30 tables, with the capacity to handle large groups through additional banquet rooms. The existing structure could accommodate an expansion of 100% of capacity. The Cobblestone Manor offers a quality dining experience, and is a regional attraction. The Manor itself is designated as a Provincial Historical Resource.

In Waterton Townsite there are some fifteen restaurants with a broader range of cuisine and quality than that found in Cardston. The three better quality restaurants are located in the hotels, the Prince of Wales, Bayshore Inn and Kilmorey Lodge. The remainder of the food service establishments include small restaurants, cafes, take-out outlets and bakery/ice-cream shops.

Elsewhere in the primary study area there are two small restaurants in Magrath of average to below average quality.

Although totals were not tabulated for the secondary zone, it can be noted that Lethbridge has the greatest concentration and variety of food services in the Chinook Country Zone.

4.2.4 Small Communities

Mountain View

The hamlet of Mountain View contains a garage/service station, a general store/gas pumps, Cariboo Clothes Ltd. and a pitch and putt golf course.

Other Communities

Four other small communities in the region have some level of visitor services. Hillspring, Glenwood, Spring Coulee and Del Bonita. All have general stores with gas pumps or garages. Hillspring also has a cafe.

4.3 TOURISM ATTRACTIONS

4.3.1 Introduction

This section summarizes the tourism attractions available in the primary study area. The definition and rating of attractions is based on a system used in the Chinook Country Tourist Association Marketing Plan (C.C.T.A.M.P.). The rating system is defined in Exhibit 4-5, and the locations of the attractions are depicted in Exhibit 4-6.

4.3.2 Man-Made Attractions

Cardston

In Cardston there are three historical attractions (Card Home, Courthouse Museum and Cobblestone Manor) of regional significance. The Card Home and the Courthouse Museum are open on a seasonal basis and have between 800 to 1,300 visitors per season.

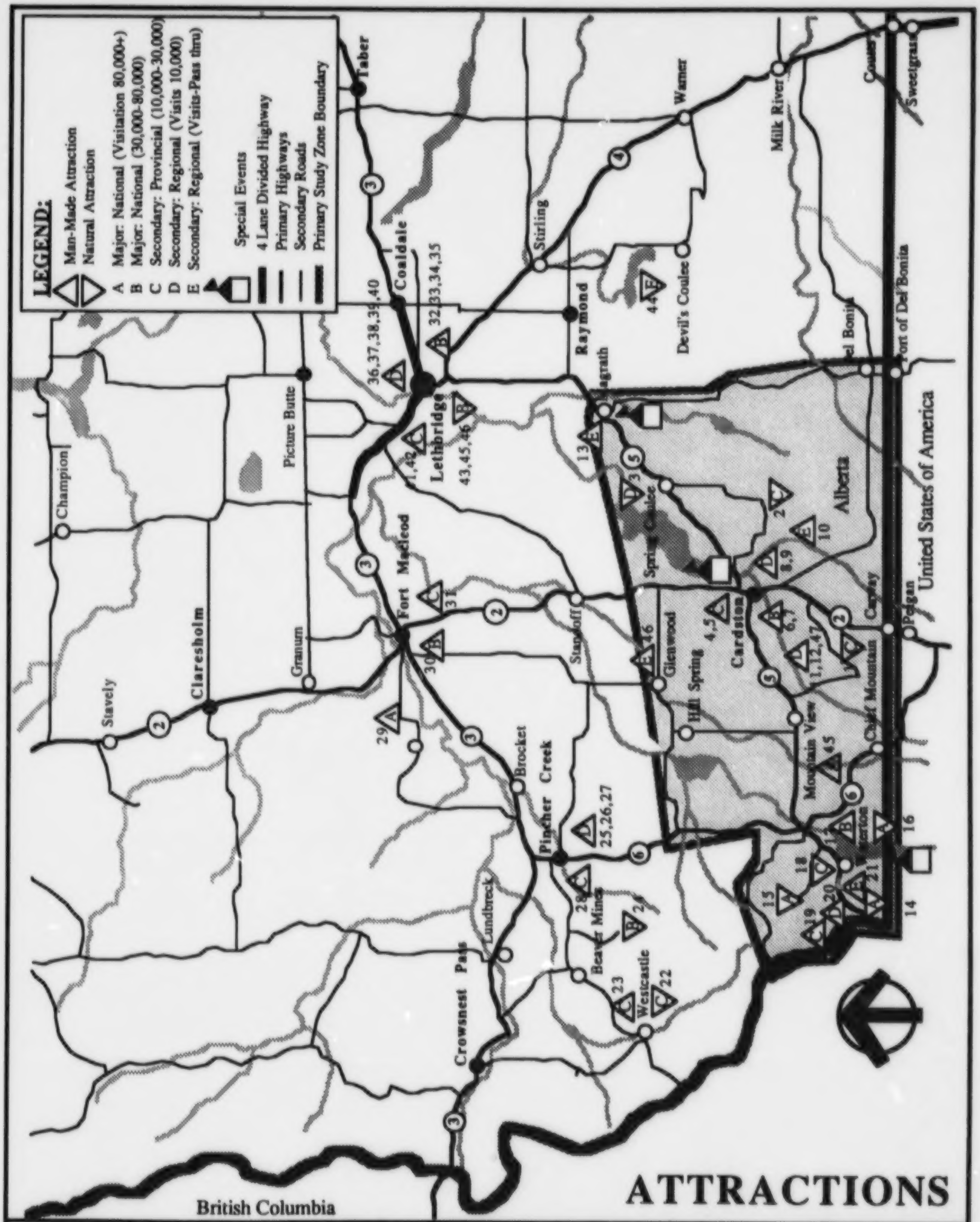
At a more general level, Cardston is currently participating in the Alberta Main Street Program of the Alberta Historical Resources Foundation. One of the main objectives of the program is restoration and enhancement of

EXHIBIT 4-5

Attraction Rating System

MAP EQUIVALENT	RATING	DESCRIPTION
A	10	Major attractions/recreation areas/landmarks of national recognition and importance which encourage visitations in excess of 80,000 persons yearly.
B	7	Major attractions/recreation areas/landmarks of national recognition and importance which encourage potential visitations of 30,000 - 80,000 persons yearly.
C	5	Secondary attractions/recreation areas/landmarks of provincial recognition/significance which encourage potential visitations of 10,000 - 30,000 persons yearly.
D	3	Secondary attractions/recreation areas/landmarks of regional recognition/significance which encourage visitations of up to 10,000 persons yearly.
E	1	Secondary attractions/recreation areas/landmarks of regional recognition/significance which encourage visitations on a "pass-through" basis only.

Source: Chinook Country Marketing Plan


LEGEND:
Man-Made Attraction
Natural Attraction
A Major: National (Visitation 80,000+)
B Major: National (30,000-80,000)
C Secondary: Provincial (10,000-30,000)
D Secondary: Regional (Visits 10,000)
E Secondary: Regional (Visits-Pass thru)
Special Events
4 Lane Divided Highway
Primary Highways
Secondary Roads
Primary Study Zone Boundary
Taber
Warner
Milk River
Coutts
Sweetgrass
Coaldale
Stirling
Raymond
Devil's Coulee
Magrath
Lethbridge
Picture Butte
Champion
Fort Macleod
Claresholm
Stavely
Granum
Standoff
Spring Coulee
Glenwood
Hill Spring
Cardston
Mountain View
Chief Mountain
Carway
Del Bonita
Port of Del Bonita
Pelgan
Alberta
United States of America
Brocket
Pincher Creek
Lundbreck
Beaver Mines
Westcastle
Crowsnest Pass
Waterton
British Columbia
36,37,38,39,40
32,33,34,35
1,42
43,45,46
31
30
29
25,26,27
28
24
23
22
44
13
3
2
8,9
10
4,5
6,7
1,12,47
46
45
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11

ATTRACTIONS

IBI
GROUP

REMINGTON CARRIAGE MUSEUM
Tourism Destination Resort Plan

EXHIBIT
4-6

KEY (FOR EXHIBIT 4-6)

ATTRACTIONS	
NAME	MAP REF.#
Primary Zone	
Police Outpost Provincial Park	1
Woodford Provincial Park	2
St. Mary's Reservoir	3
Mormon Temple	4
Remington Carriage Collection	5
Cobblestone Manor	6
Cardston Agridome/Buffalo Paddock	7
C.O. Card Home	8
Courthouse Museum	9
Wild Rose Game Farm	10
Badger Valley Ranch	11
Chateau Isabella	12
Buffalo Slope Elevator	13
Cameron Lake & Falls	14
Red Rock Canyon	15
Waterton Lakes	16
Scenic Boat Cruises	17
Buffalo Paddock	18
Heritage Centre	19
Kootenai Brown Historic Site	20
Oil City Historic Site	21
Prince of Wales Hotel	45
Glenwood Cheese Factory	46
Morgan Lybert Quarter Horse Ranch	47
Secondary Zone	
Westcastle Recreation Area	22
Westcastle Ski Area	23
Beauvais Lake Provincial Park	24
Crystal Village	25
Lebel Mansion	26
Museum & Kootenai Brown Hist. Park	27
Gladstone Mtn. Guest Ranch	28
Head-Smashed-In Buff.Jump	29
Fort Museum	30
Fort Macleod Historical Area	31
Nikka Yuko Japanese Gardens	32
Brewery Garden	33
Alexander Galt Museum	40
Southern Alberta Art Gallery	41
University of Lethbridge	42
Henderson Lake Park	43
Devil's Coulee Dinosaur Egg Site	44
Helen Schuler Centre	45
Fort Whoop-Up/Indian Battle Park	46

KEY (FOR EXHIBIT 4-6)

EVENTS	
NAME	SCALE
Primary	
CARDSTON:	
- Snafflebit Futurity	Regional/National
- Buffalo B.B.Q.	Local/Regional
- Heritage Days	Local/Regional
- Professional Rodeo	Local/Regional
- Community Theatre	Local/Regional
WATERTON:	
- Beargrass Days	Local
- Educational Events	Local
- Nature/History Sessions	Local
- Canada Day Celebration	Local
MAGRATH:	
- Yearly Town Birthday Celebration	Local

historical buildings. The Main Street is notable for a fine collection of heritage buildings. Seven to eight buildings have recently had restoration work done to the facades and some nine more are scheduled to be done in the next 2 years. Therefore, to a growing extent the downtown Main Street can be considered a historical attraction of regional significance.

Also in Cardston is the Mormon Temple, which is a major attraction of national significance. Its yearly visitation numbers are approximately 120,000; of this total, 20,000 are visitors to the grounds only and 100,000 are Temple users. It is open year-round with a public visitors' centre.

An attraction of local/regional significance is a buffalo paddock, with a small herd of buffalo, located on the Agridome grounds. The Agridome itself is rated a secondary attraction of provincial significance in the Tourism Marketing Plan.

Waterton

Man-made attractions in Waterton Park include scenic boat cruises, the Prince of Wales Hotel, the Oil City Historic Site, the Kootenai Brown Historic Site, and the Waterton Heritage Centre. The latter three are considered secondary attractions ranging from regional to provincial significance. The Heritage Centre is a small museum in the Townsite that is open on a seasonal basis only. The scenic boat cruises are considered a major attraction of national importance with visitation of approximately 41,000 per year. The Prince of Wales Hotel is considered an attraction as well as a form of accommodation. Based on its yearly visitation of 161,000, it is a major attraction of national significance.

Magrath

Also in the primary study area is the Town of Magrath, which features a unique "buffalo slope" grain elevator, which is considered a secondary attraction of regional significance.

Region

The Glenwood Cheese Factory attracts between 10 and 20 tourists per day (on a day-trip basis from Waterton) but is not capable of providing tours due to health regulations and lack of proper viewing facilities. There are tentative plans to build an enclosed viewing area inside the factory.

Within 10 to 15 km of Cardston are several small secondary attractions of regional significance. These include the Morgan Lybert Quarter Horse Ranch, Badger Valley Ranch, Wild Rose Game Farm and Chateau Isabella.

Secondary Study Area

Lethbridge has the greatest concentration of attractions in the secondary study area, including Fort Whoop-Up, Lethbridge Brewery and Gardens, Nikka Yako Japanese Garden, Canada Games Sportsplex, Henderson Lake Park/ Lethbridge Urban Park, High Level Bridge, Sir Alexander Galt Museum, Southern Alberta Art Gallery, Bowman Arts Centre, Helen Schuler Coulee Centre, University of Lethbridge and Indian Battle Park. The majority of these attractions are cultural/historical in nature. The first five rank as major attractions of national recognition and significance, while the rest are secondary attractions varying from regional to provincial significance.

Attractions in the Fort Macleod area include the Fort Museum, Fort Macleod Provincial Historical Area, Fort Macleod Summer Theatre and the Head-Smashed-In Buffalo Jump Interpretive Centre. Head-Smashed-In and the Fort Museum are ranked as major attractions of national recognition and importance. Head-Smashed-In has approximately 140,000 visitors per year while the Fort has a yearly visitation of approximately 50,000. The Historical Area and Summer Theatre are secondary attractions of provincial importance. The Summer Theatre's popularity is such that reservations are required several months in advance.

In the Pincher Creek area, attractions include the Gladstone Mountain Guest Ranch, Westcastle Ski Resort, Kootenai Brown Historic Park and Museum, Crystal Village and Lebel Mansion. These are all considered secondary attractions ranging from regional to provincial importance.

Proposed

Development of several new attractions is proposed: in Cardston, an antique doll museum is scheduled to open during the Summer of 1989; near Pincher Creek, adjacent to the Oldman river, an historic working ranch is being developed; a rare exposed Oyster Shell Bed together with a man-made historic kiln on private lands south of Cardston may be designated as a Provincial Historic Site.

4.3.3 Natural Attractions

Waterton National Park as a whole is considered a natural attraction with a significant number of visitors (1986 - 312,000). The Park gates are only 43 kilometres from Cardston and the Remington Carriage Collection.

Natural attractions in Waterton National Park include Waterton Lake, Cameron Falls, Cameron Lake and Red Rock Canyon. These are considered major attractions of national recognition and importance, and generated the following 1986 visitation levels: Cameron Falls - 156,000; Cameron Lake - 117,000; and Red Rock Canyon - 113,000.

The Buffalo Paddocks located near the Park entrance are a secondary attraction of provincial significance. Approximately 52,000 people per year visit the site.

Also in the primary study area are two Provincial Parks. These are Police Outpost and Woolford. They are quite scenic, but small parks, which are rated as secondary attractions of regional to provincial recognition and importance.

Another attraction close to Cardston is the St. Mary's Reservoir, which is used almost exclusively as a local/regional recreational day use and camping area. There are also two smaller reservoirs of similar nature in the primary study area, Waterton and Jensen Reservoirs.

There are a few smaller scale natural attractions which complement other attractions in a given area. For example, in Magrath there is the Pothole Creek, which runs through town and offers scenic walking and some unique stands of vegetation. Similarly, the Lees Creek through Cardston may be considered a complementary natural attraction, particularly since it is adjacent to the campground and proposed development site for the Remington Carriage Collection.

Natural attractions in the secondary area include the Westcastle Recreation Area and Beauvais Provincial Park in the vicinity of Pincher Creek. Lethbridge has a good quality urban lake and park as well as Park Lake Provincial Park. In the vicinity of Raymond there is the Devil's Coulee Dinosaur Egg Site, which is a small scale secondary attraction at present, but has been identified by the Chinook Country Tourist Zone as a potential tourism facility development site.

4.3.4 Events

Numerous local and regional events provide additional opportunities and attractions for tourists.

Cardston features the annual Heritage Days, which includes horse shows, an agricultural fair and a rodeo; the Labour Day Buffalo Barbeque and the Snafflebit Futurity races; ongoing professional rodeos are staged throughout the year at the Agridome grounds; and an active community theatre group that operates out of a facility in the Civic Centre.

Waterton Town features a number of different events during the peak season: once a week nature-oriented Educational Events; nature/history theme lectures and demonstration sessions each night of the summer; Heritage Day celebrations; the Beargrass Festival (several days in late August) and the Heritage Ball that are local and tourist-oriented, and feature parades and special events.

Elsewhere in the primary study area there is a yearly town birthday celebration in Magrath.

4.4 TOURISM INFRASTRUCTURE

4.4.1 Municipal Servicing Constraints

Cardston

Recent service upgrading includes a new sewage treatment plant and expanded water treatment and storage facilities. According to Town sources these facilities provide for significantly greater capacity than currently needed. A new landfill site has also been recently developed. To summarize, the present level of municipal services pose no constraints to urban growth in Cardston.

Magrath

Sewer service is a potential constraint, due to limited storage capacity of the reservoir. Although there are tentative plans for expansion, the present level of servicing would limit the Town to an approximate 10% increase in growth.

Waterton Townsite

The water and sewer system capacity of the Townsite would not be a constraint to additional growth. However, the Townsite is located on an alluvial fan, surrounded by either the lake or a steep mountainside. Most of the developable delta area has been built upon, leaving very limited area for future growth. There is basically no available land for outward expansion of the present Town boundary. Future growth will therefore be limited to a number (approximately 7-8) of undeveloped lots with commercial potential, and/or several lots which are under-utilized and could be redeveloped.

4.4.2 Community Recreational Facilities

Cardston

As the largest urban centre in the defined primary area, Cardston offers a good range of local recreational facilities.

Centennial Park, which is adjacent to the Lees Creek campground, is a large open space area with playing fields and a track. Several other local parks which are well suited to picnicking and walking. An indoor swimming pool, ball diamonds and tennis courts can be found at Lions Park, which is situated adjacent to Lees Creek, across from the proposed Carriage Collection site. The Town also has an indoor ice arena, and a 9-hole golf course which is located about one kilometre southwest of Town, and is considered quite scenic and of good quality.

Magrath

This smaller town features a good quality 18-hole golf course, indoor ice arena, fish pond, outdoor pool, tennis courts and a few local parks. The most notable park area is along the scenic Pothole Creek. The municipal campground is also located here. There are currently plans for an Interpretive Nature Trail. There is also a local race track and rodeo grounds in Town.

A pitch and putt golf course is available in the hamlet of Mountain View, which is on Highway 5 between Waterton and Cardston.

Waterton Townsite

There are limited community recreational facilities in or adjacent to the Townsite, including an 18-hole golf course, outdoor pool, horseback riding stables, tennis courts and a marina.

4.4.3 Transportation Network

The regional transportation network is depicted in Exhibit 4-7.

Cardston

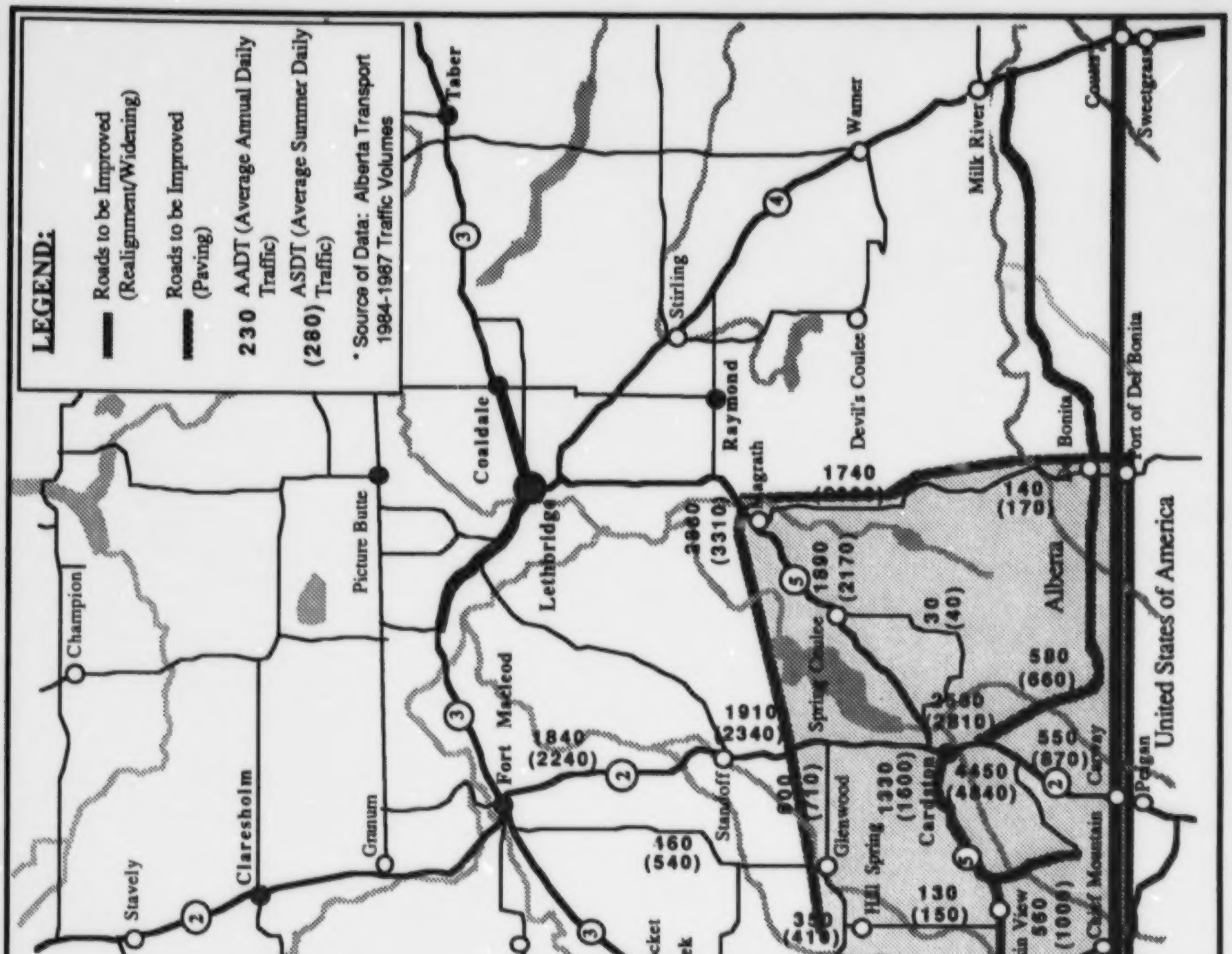
The Town is well situated with respect to the regional road network. It is located at the junction of Highways 2 and 5, with the former being the major north/south provincial route, and the latter providing direct east/west access to Waterton National Park. The town is situated in such a manner that Highway 2 is the Main Street for the downtown core.

Highway 2 is a good quality, two-lane, undivided route that has been upgraded between Fort Macleod and the U.S. Border at Carway by widening and paving the shoulders. Highway 5 is a two-lane, undivided, paved route. East of Cardston the carriageway width and alignment are at a high standard. However, west of Cardston the Highway requires some re-alignment and increased carriageway (presently has no shoulders). This work is in the planning stages and is expected to be undertaken from Waterton to Cardston over the next several years.

Region

As previously indicated, the region is served by Highway 2, the principal north/south route in Alberta, and Highway 5, an east/west route connecting Lethbridge with Waterton National Park. Further north in the secondary study area is Highway 3, the principal east/west route in southern Alberta connecting to British Columbia through the Crowsnest Pass.

Highway 62, a two-lane, undivided, paved route is the eastern boundary of the primary study area. It is a north/south route connecting to the U.S. border crossing at Del Bonita. South of Del Bonita the road is in poor, gravel-surfaced condition for approximately 15 km. This is a constraint to increased tourism traffic using this north/south route.


Taber
Warner
Milk River
Coutts
Sweetgrass
Stirling
Devil's Coulee
Raymond
Magrath
Coaldale
Lethbridge
Picture Butte
Champion
Bonita
Port of Del Bonita
Alberta
United States of America
Spring Coulee
Cardston
Carway
Peigan
Fort Macleod
Standoff
Glenwood
Hill Spring
Mountain View
Chief Mountain
Waterton
Granum
Claresholm
Stavely
Brocket
Pincher Creek
Lundbreck
Beaver Mines
Westcastle
Crowsnest Pass
British Columbia
1740
3880
(3310)
1890
(2170)
140
(170)
30
(40)
580
(660)
2580
(2810)
550
(670)
4450
(4840)
1910
(2340)
1840
(2240)
1330
(1600)
160
(540)
130
(150)
560
(1000)
350
(410)
470
(840)
(840)
700
(1250)

LEGEND:

- Roads to be Improved (Realignment/Widening)
- Roads to be Improved (Paving)

230 AADT (Average Annual Daily Traffic)

(280) ASDT (Average Summer Daily Traffic)

* Source of Data: Alberta Transport 1984-1987 Traffic Volumes

REGIONAL TRANSPORTATION NETWORK

IBI GROUP	REMINGTON CARRIAGE MUSEUM Tourism Destination Resort Plan	EXHIBIT 4-7

Highway 6 north from Waterton is a two-lane, undivided route that is paved but has a narrow carriageway (no shoulders).

There are a number of secondary roads of varying quality in the primary study area. Secondary roads are the local municipalities' responsibility.

Secondary Road 501, goes southeast and east of Cardston, is gravel surfaced at present, but is in the process of being upgraded. Its carriageway is of adequate standard. The upgrading will be a benefit to U.S. tourists coming across the border at Del Bonita and desiring to travel in a northwesterly direction through Cardston.

The east/west S.R. 505 connects Highways 2 and 6 in the region. Although it is paved, it has a relatively narrow carriageway. There are no plans at present for upgrading.

4.5 TOURISM PROGRAMS

4.5.1 Introduction

There are a number of recent and ongoing studies/programs which have relevance to the Remington Carriage Museum Destination Resort Plan. These are briefly summarized hereinafter.

4.5.2 Cardston Community Tourism Action Plan

The Plan identifies tourism markets, tourism assets and concerns, tourism goals and objectives, and tourism action steps. It also identifies current deficiencies in the Town's tourism service/infrastructure and goes on to recommend improvements to the same. Given the overlap in certain areas of the Destination Resort Plan and the C.C.T.A.P. it will be important to rationalize the findings/recommendations of these two documents.

4.5.3 The Alberta Main Street Programme

This is a program of the Alberta Historical Resources Foundation, with the assistance of Alberta Culture and Multi-Culturalism and the Heritage Canada Foundation. The aim of the Programme is to strengthen the downtown business area and promote heritage conservation.

Cardston is one of about 7 communities in Alberta that are involved with the Programme. A Resource Support Team Report provided an assessment and recommendations on heritage building resources, market data, commercial and economic development, and project organization and management.

To date the Cardston Main Street Programme has been responsible for funding for marketing initiatives, market and retail surveys, a management assistance program and the interpretation/definition of the historical business area. In 1988, 8 buildings in the downtown had exterior restoration work done. It is expected that 9 or so more will be restored in 1989/90.

To summarize, this programme is helping to improve the appearance of the downtown and hence its potential attractivity to tourists.

4.5.4 Chinook Country Tourist Association Marketing Plan

The Plan provides a clear direction on Zone marketing and promotion initiatives for the coming year by detailing specific recommendations for the development of a coherent marketing plan.

The Marketing Plan provides a mechanism and the strategic direction for a coordinated and concerted marketing effort within the Zone. Its implementation will go a long way to enhancing opportunities for increased visitation to the Zone. Notwithstanding, full effectiveness in terms of increased visitation and expenditures within the Remington economic impact zone will require improvements to the existing tourism infrastructure and services as well as the addition of attractions within this area.

4.6 SUMMARY

Accommodation

Fixed roof accommodation is clustered in the two larger urban centres in the primary study area, Waterton Townsite and Cardston. This also applies to the secondary zone centres of Lethbridge, Pincher Creek and Fort Macleod. Motels in Cardston are presently under-utilized to some degree during in-season weekdays and to a significant degree during the off-season. Hotels and motels in Waterton are close to or at capacity during the in-season period. With the exception of one hotel, all of the fixed roof accommodation in Waterton is open on a seasonal basis only.

Campgrounds are the alternative form of purchased accommodation for tourists. There are a large number of sites available in the primary study area because of the two provincial parks (Police Outpost and Woolford) and national park (Waterton). While there is a mix of public and private campgrounds, there are virtually no private facilities outside of the Waterton area. There are a variety of campground sizes (number of sites) and level of services (power, water, sewer or unserviced hook-ups) throughout the Waterton area, with less variety in the balance of the study area. In Waterton, campgrounds generally have a high occupancy rate during the peak season, while in the balance of the study area they are largely underutilized except on occasional summer weekends. As with hotels/motels there is a significant reduction in demand during the shoulder season. Cardston has only two campgrounds in town with a limited number of sites.

In the secondary study area there is a mix of private, municipal and provincial park campgrounds located in or near the three principle urban centres.

Food Services

A similar clustering pattern exists for restaurants. Waterton has the greatest number of restaurants, and variety and quality of food service. Cardston has fewer restaurants with less variety and lower quality. The Cobblestone Manor is the only higher quality dining experience in Cardston. A notable constraint with most restaurants in Cardston is that they do not have the capacity to handle large groups of visitors (i.e., tour groups). Other than in Magrath there are no additional restaurants in the primary study area.

Attractions

The primary study area includes Waterton National Park, the Remington Carriage Collection and the Mormon Temple as major attractions. There are also a number of secondary attractions in Cardston and the immediate area. The secondary area includes a greater number of major attractions including Head-Smashed-In Buffalo Jump, Fort Whoop-Up and Fort Macleod Museum. There is also a concentration of secondary attractions in Lethbridge and Pincher Creek.

Most of the man-made attractions are cultural/historical in nature. Special event attractions are fewer in number and are all of secondary importance. With the exception of the Provincial Parks, all major and secondary attractions are clustered in or near the urban centres.

Special Events

All special events in the study area are local/regional in nature and do not tend to be well-connected to tourism promotion. However, there are efforts at present to coordinate schedules that may enhance regional touring opportunities. The special events are all held during the summer months, with the exception of ongoing rodeos in Cardston.

Services

Cardston has an adequate level of community recreation facilities as part of the general tourism infrastructure. It has the most extensive facilities of any urban centres in the primary study area. This is in keeping with its larger population of approximately 3,500. Both Waterton and Magrath have more limited community recreational facilities.

With respect to servicing (water, sewer, etc.) capacity that could limit or enhance development potential, Cardston has no long-term constraints. In fact, there are a number of developable areas within the existing Townsite. Waterton is severely limited for expansion growth by geographic constraints, although there are some potential development sites within the present Townsite. Magrath has short and long-term growth constraints due to limited sewer capacity.

The primary and secondary highway network adequately connects the urban centres and provides reasonable access to most tourism services and attractions. The eventual upgrading of Highway 5 between Waterton and Cardston will be a significant factor in drawing tourists from the National Park market area. Improvements to Secondary Road 501 from Cardston to Del Bonita will improve tourist traffic potential.

5.0 TOURISM MARKET ASSESSMENT

This section includes an examination of the existing tourism market in the Chinook Country Tourist Zone and Waterton Lakes National Park, a brief overview of potential markets, an examination of the market experience of other regional attractions, and a visitation projection for the Remington Carriage Museum. Secondary data sources were employed in the analyses throughout this section.

5.1 TRAVEL PATTERNS

No single up-to-date source of data is available to define visitor profiles and visitation levels in the study area. Accordingly, the visitation estimates and visitor profiles developed in this section were derived from a variety of sources:

- the 1988 Chinook Country Tourist Association Marketing Plan;
- the 1982 and 1986 Canadian Travel Survey;
- the 1988 Waterton Tourism Study Marketing Strategy;
- the 1986 Remington Carriage Collection Feasibility Study;
- the 1988 Cardston Tourism Action Plan;
- the 1984 Chinook Country Tourism Destination Study; and
- other sources including Visitor Information Centre statistics, Border Crossing statistics, highway traffic counts, etc.

5.1.1 Chinook Country Zone Tourist Market

The most recent estimation of visitation levels to the Chinook Country Zone was undertaken for the 1988 Tourism Action Marketing Plan study. That study employed the 1982 and 1986 Canadian Travel Survey data in addition to the 1988 Waterton Study data to estimate total visitation. As indicated in Exhibit 5-1, total annual visitation is estimated at 1,900,000 visitor trips, with approximately two thirds of the visitors originating from Alberta, and one fifth originating from United States origins.

EXHIBIT 5-1

1986 Estimated Chinook Country Zone Visitation

VISITOR ORIGIN	VISITORS	PERCENT
Alberta	1,208,000	65%
Other Canada	242,000	13%
United States	353,000	19%
Other Countries	56,000	3%
TOTAL	1,859,000	100%

Source: Chinook Country Marketing Plan

Due to the variety of sources used to calculate the visitation estimate, the estimate and distribution by origin should be considered to be representative of orders of magnitude rather than precise figures.

5.1.2 Waterton Lakes/Glacier National Parks

Waterton Lakes National Park is included in the Primary Impact Area for this study. Located in the southwestern corner of the province, the park - together with Glacier National Park - forms the Waterton-Glacier International Peace Park, which is a major tourist destination for Canadian and American tourists.

Research conducted for the 1986 Remington Carriage Collection Feasibility Study noted that total visitation to Glacier Park was in the range of 500,000 to 750,000 vehicles per annum through the 1980's. However, due to high levels of commuter traffic, local destination traffic, and already accounted trans-border traffic, the total visitation estimate was adjusted downwards by more than 60%. The resulting figures were estimates of the potential market of Glacier Park visitors who were not also visiting Canada. The average Glacier Park potential market was estimated at approximately 450,000 visitors annually.

Annual visitation to Waterton Lakes National Park was estimated from the 1986/87 Exit Survey conducted by Psnnrll Kerr Forster. The estimated total annual number of visitors by visitor origin is summarized in Exhibit 5-2. Over half of the total numbers of visitors originate from Alberta, while American visitors account for one third of the total number of visitors, which is estimated at 312,000.

EXHIBIT 5-2

1986/87 Waterton Park Visitation Estimate

VISITOR ORIGIN	VISITORS	PERCENT
Alberta	173,000	56%
Other Canada	31,000	10%
United States	100,000	32%
Other Countries	8,000	3%
TOTAL	312,000	100%

Source: Waterton Tourism Study

5.1.3 Ports of Entry

Four Canada/United States border crossings are located within the Chinook Country Zone including Chief Mountain, Carway/Peigan, Del Bonita, and Coutts/Sweetgrass.

The Chinook Country Tourist Association analyzes data provided by Canada Customs on northbound border crossings within the zone. Exhibit 5-3 summarizes the estimated number of tourists (including Canadians returning and Americans departing from the U.S.A) entering Alberta by port of entry. As indicated in that Exhibit, the average summer season estimate is approximately one-third of one million visitors, primarily entering the province via the ports of Carway and Chief Mountain.

Although Coutts is the major year-round port of entry, its estimated volume of summer tourists is only some 40% of the level of Carway or Chief Mountain. The majority of visitors entering Alberta at Chief Mountain are destined for Waterton Park, while the majority of visitors entering Alberta at Carway/Peigan are destined for or will pass through Cardston.

EXHIBIT 5-3

Estimated Summer Tourist* Volumes Entering Alberta

(by Port of Entry)

PORT	YEAR			5 YEAR AVERAGE
	1986	1987	1988	
Coutts	57,300	45,900	64,200	57,200
Carway	130,600	138,800	138,200	134,500
Chief Mountain	126,500	128,800	135,300	132,200
Del Bonita	4,900	5,300	7,100	6,000
TOTAL	319,300	318,800	344,800	329,900

* May through September

Source: Chinook Country Tourist Association

5.2 VISITOR PROFILES

5.2.1 Chinook Country

Two sources of data are available for profiling visitors to Chinook Country: Tourist Information Centre visitor statistics; and data from the 1986 Travel Survey.

Exhibits 5-4 and 5-5 summarize the total number of visitors to Chinook Country Tourist Information Centres in 1987 and 1988, as well as visitor origins and seasonal origin distributions. As indicated in the Exhibits, the 1988 tally at 120,000 is an increase of almost 25% over the 1987 level. The Lethbridge Scenic Drive Information Centre remains the most heavily visited, followed by Brewery Hill, Head-Smashed-In, and Cardston. However, the level of visitation at Cardston remained virtually unchanged in 1988 over 1987.

The composite origin table indicates that approximately 48% of Information Centre visitors are from Alberta origins. Other Canadian origins accounted for 15% of the total, while U.S.A. origins accounted for some 32% of the total, and other foreign origins accounted for 4%. Although local and zone-originating visitors accounted for 21% of the total, it should be noted that the distribution is probably biased towards visitors from more distant origins because local residents are less likely to use the services of the Tourist Information Centres.

Exhibit 5-5 details the percentage distribution of Tourist Information Centre visitors by season. As indicated in that exhibit, the proportion of visitors from the United States increases significantly in the summer season (34% compared to the year-round average of 26%).

Exhibit 5-6 details the total number of visitors and their origins for the Cardston Tourist Information Centre. The exhibit documents the dominance of the July-August peak season, which accounts for 75% of the total number of visitors at the Information Centre from May through September. This strong seasonal pattern was also noted by operators of the tourist-related facilities and attractions in the area. The distribution of visitor origins is significantly different from the Chinook Country Information Centre composite distribution. The proportion of visitors originating from the United States is significantly higher in Cardston (60% versus 34%) than for the other centres in the zone, significantly lower for Alberta origins

EXHIBIT 5-4

1988 Tourist Season Synopsis
Chinook Country Tourist Information Centres

TOTAL VISITORS:

	1988 VISITORS	1987 VISITORS	PERCENT CHANGE
Scenic Drive	38,097	36,954	+3%
Brewery Hill	30,140	19,461	+55%
Cardston	12,340	12,207	+1%
Head-Smashed-In	30,120	20,216	+49%
Pincher Creek	4,351	4,049	+7%
Taber	4,377	3,326	+32%
TOTAL	119,425	96,213	+24%

VISITOR ORIGINS:

	1988 VISITORS	PERCENT
City/Municipality	15,906	13%
Other Intra Zone	9,077	8%
Other Alberta	32,690	27%
British Columbia	7,235	6%
Saskatchewan	4,326	4%
Other Prov. & Terr.	6,532	5%
Montana	6,702	6%
Washington/Idaho	2,362	2%
Other Western States	14,817	12%
Other States	14,485	12%
Other Countries	5,293	4%
TOTAL	119,425	100%

Source: Chinook Country Tourist Association

EXHIBIT 5-5

Chinook Country Visitor Origins: T.I.C. Composite by Season

	WINTER	SPRING	SUMMER	FALL	TOTAL
Intra Zone	39%	31%	19%	24%	28%
Other Alberta	25	31	27	34	29
British Columbia	6	7	6	6	6
Saskatchewan	3	3	4	2	3
Other Prov. & Terr.	7	4	5	4	5
Montana	9	7	5	10	8
Other Western States	5	8	16	10	10
Other States	5	5	13	8	8
Other Countries	1	4	4	3	3
TOTAL	100%	100%	100%	100%	100%

WINTER - December, January, February
SPRING - March, April, May
SUMMER - June, July, August
WINTER - September, October, November

Source: Chinook Country Tourist Association

EXHIBIT 5-6

1988 Tourist Season Synopsis
Cardston Tourist Information Centre

TOTAL VISITORS:

	1988 VISITORS	1987 VISITORS	PERCENT CHANGE
May	608	700	-13%
June	2,283	2,462	-7%
July	5,005	4,796	+4%
August	4,040	4,249	-5%
September	404	0	N/A
TOTAL	12,340	12,207	+1%

VISITOR ORIGINS:

	1988	PERCENT
Community	418	3%
Zone	534	4%
Other Alberta	2,431	20%
British Columbia	398	3%
Saskatchewan	245	2%
Other Provinces	347	3%
Montana	821	7%
Washington/Idaho	690	6%
Other Western States	2,481	20%
Other States	3,378	27%
Other Countries	597	5%
TOTAL	12,340	100%

Source: Chinook Country Tourist Association

(27% versus 46%), and significantly lower for other Canadian origins (8% versus 15%).

Exhibit 5-7 details other key elements in the Profile of Visitors to Chinook Country. As indicated in that exhibit, the "typical" Canadian visitor party is composed of 2.6 persons on a day trip or passing through, travelling by automobile for pleasure or to visit relatives, and with a head-of-party educational level of high school completion or less, and household income of $30,000 or less.

5.2.2 Waterton Park

The 1988 Waterton Tourism Study employed various primary data collection techniques in order to develop visitation statistics and a visitor profile for the park. The Waterton Tourism Study Final Report is employed as the sole source of data in this subsection.

Exhibit 5-8 details visitors' origins by season for Waterton National Park. On average, some 55% of the Park's visitors originate from within Alberta, with 11% from other Canadian origins, 31% from American origins, and 3% originating from other countries. The summer season - which accounts for 66% of total annual visitation - has a significantly different distribution of visitor origins, with Americans accounting for an increased share of the total (37% versus 31% year-round), and Albertans accounting for a decreased share (45% versus 55%).

Exhibit 5-9 provides a summary profile of visitors to the national park. As indicated in that exhibit, the "typical" visitor is on a day trip or passing through during the summer season, with a household income of $20,000 to $40,000, travelling by automobile or R.V., while on vacation.

Exhibit 5-10 estimates the number of visitors to Waterton National Park who also visit selected other attractions and communities in Alberta. Although the number of Waterton Park visitors who also visit other attractions and communities is quite significant in some cases (e.g. more than 10% of the Head-Smashed-In Buffalo Jump attendance), less than one in five Waterton visitors visited other attractions in Alberta, and only 40% of Waterton visitors visited other communities in Alberta. These figures point to the importance of Waterton visitors as both an existing and potential market for the Remington Carriage Museum.

EXHIBIT 5-7

Chinook Country Canadian Visitor Profile

	CHINOOK COUNTRY AVERAGE
Average Party Size	2.6
Day Trip/Pass Through Percentage	58%
Overnight Percentage	42%
Weekend Trip Proportion	49%
Seasonal Distribution:	
- First Quarter	30%
- Second Quarter	19%
- Third Quarter	29%
- Fourth Quarter	22%
Age:	
- Not stated or under 15	23%
- 15 - 19	11%
- 20 - 34	29%
- 35 - 54	24%
- 55 - 64	6%
- 65+	7%
Attained Education:	
- High School or Less	62%
- Some Post Secondary/ Post Secondary Diploma	23%
- University Degree	15%
Household Income:	
- Not stated or Less than $10,000	16%
- $10,000 - $30,000	34%
- $30,000 - $40,000	15%
- $40,000 - $60,000	15%
- $60,000+	19%
Duration of Visit:	
- 0 nights (day use/pass through)	58%
- 1 night	15%
- 2 nights	16%
- 3+ nights	12%
Vehicle Type:	
- Auto (including car, truck and R.V.)	95%
- Other	5%
Trip Purpose:	
- Visit Friends/Relatives	33%
- Pleasure	40%
- Personal Business	11%
- Business/Convention	16%
Accommodation Used:	
- Hotel/Motel	41%
- Campground	14%
- Other	46%

Source: Derived from the Chinook Country Tourism Action Marketing Plan and the 1986 Canadian Travel Survey.

EXHIBIT 5-8

Waterton National Park Visitor Origins by Season

	WINTER	SPRING	SUMMER	FALL	TOTAL
Southern Alberta	76%	57%	27%	31%	37%
Other Alberta	12	19	18	20	18
British Columbia	3	3	3	11	4
Saskatchewan	2	0	3	3	3
Other Prov. & Terr.	4	2	3	7	4
Montana	0	3	7	3	5
Other Western States	2	7	15	9	11
Other States	1	7	12	20	15
Other Countries	0	3	2	4	3
TOTALS	100%	100%	100%	100%	100%
	9%	17%	66%	8%	100%

WINTER - December, January, February
SPRING - March, April, May
SUMMER - June, July, August
WINTER - September, October, November

Source: PKF Waterton Tourism Study

EXHIBIT 5-9

Waterton Lakes National Park Visitor Profile

	CHINOOK COUNTRY AVERAGE
Day Trip/Pass Through Percentage	62%
Overnight Percentage	38%
Seasonal Distribution:	
- Winter (Nov. 1 - Apr. 14)	9%
- Spring (Apr. 15 - June 14)	17%
- Summer (June 15 - Sept. 7)	66%
- Fall (Sept. 8 - Oct. 31)	8%
Household Income:	
- Not stated or less than $20,000	15%
- $20,000 - $40,000	30%
- $40,000 - $60,000	28%
- $60,000+	27%
Duration of Visit:	
- 0 nights (day use/pass through)	62%
- 1 night	20%
- 2+ nights	18%
Vehicle Type:	
- Auto (including car and R.V.)	66%
- Other	34%
Trip Purpose:	
- Social/Family	44%
- Vacation	51%
- Personal Business	2%
- Business/Convention	2%
Accommodation Used:	
- Hotel/Motel	45%
- Campground	47%
- Other	8%

Source: Waterton Tourism Study

EXHIBIT 5-10

Visitation to Other Attractions and Communities by Visitors to Waterton Lakes National Park

ATTRACTIONS/COMMUNITY	VISITORS	
	% of Total	Number
Head-Smashed-In Buffalo Jump	23.0	14,000[1]
Tyrrell Museum	7.9	5,000
Mormon Temple	7.1	4,000
Frank Slide Centre	5.8	4,000[2]
Cardston	8.3	11,000
Lethbridge	7.8	10,000
Fort Macleod	6.5	8,000
Other S.W. Alberta	5.5	7,000
Pincher Creek	4.6	6,000

[1] Represents some 12% of the facility's total attendance.
[2] Represents some 4% of the facility's total attendance.

Source: PKF Waterton Tourism Study.

5.3 MAJOR SOUTHERN ALBERTA ATTRACTIONS

Alberta Culture operates three major interpretive centres in Southern Alberta: the Frank Slide Interpretive Centre; the Head-Smashed-In Buffalo Jump; and the Tyrell Museum.

The Frank Slide Interpretive Centre was opened to the public in May of 1985, and experienced a pro-rated annual visitation level of approximately 85,000 that year. Visitation increased in both 1986 and 1987, when it peaked at approximately 108,000 visitors. The 1988 visitation estimate was 107,000 visitors. The average annual attendance at the Frank Slide Interpretive Centre is estimated at approximately 99,000 visitors.

The Head-Smashed-In Buffalo Jump Interpretive Centre was opened to the public in July 1987; the pro-rated annual visitation estimate for that year was 164,000 visitors. In 1988, the total level of visitation was estimated at approximately 131,000, which represents a decline of some 20% from the previous year's level.

The Tyrell Museum was opened to the public in September of 1985, and the pro-rated annual visitation was estimated at approximately 500,000 persons for that year. In 1986, visitation increased significantly to 559,000, but declined in 1987 to approximately 479,000 visitors. The 1988 visitation estimate was 491,000 visitors, which is equivalent to 96% of the opening year level of visitation.

The visitation trends for the major Southern Alberta interpretive centres are depicted graphically in Exhibit 5-11.

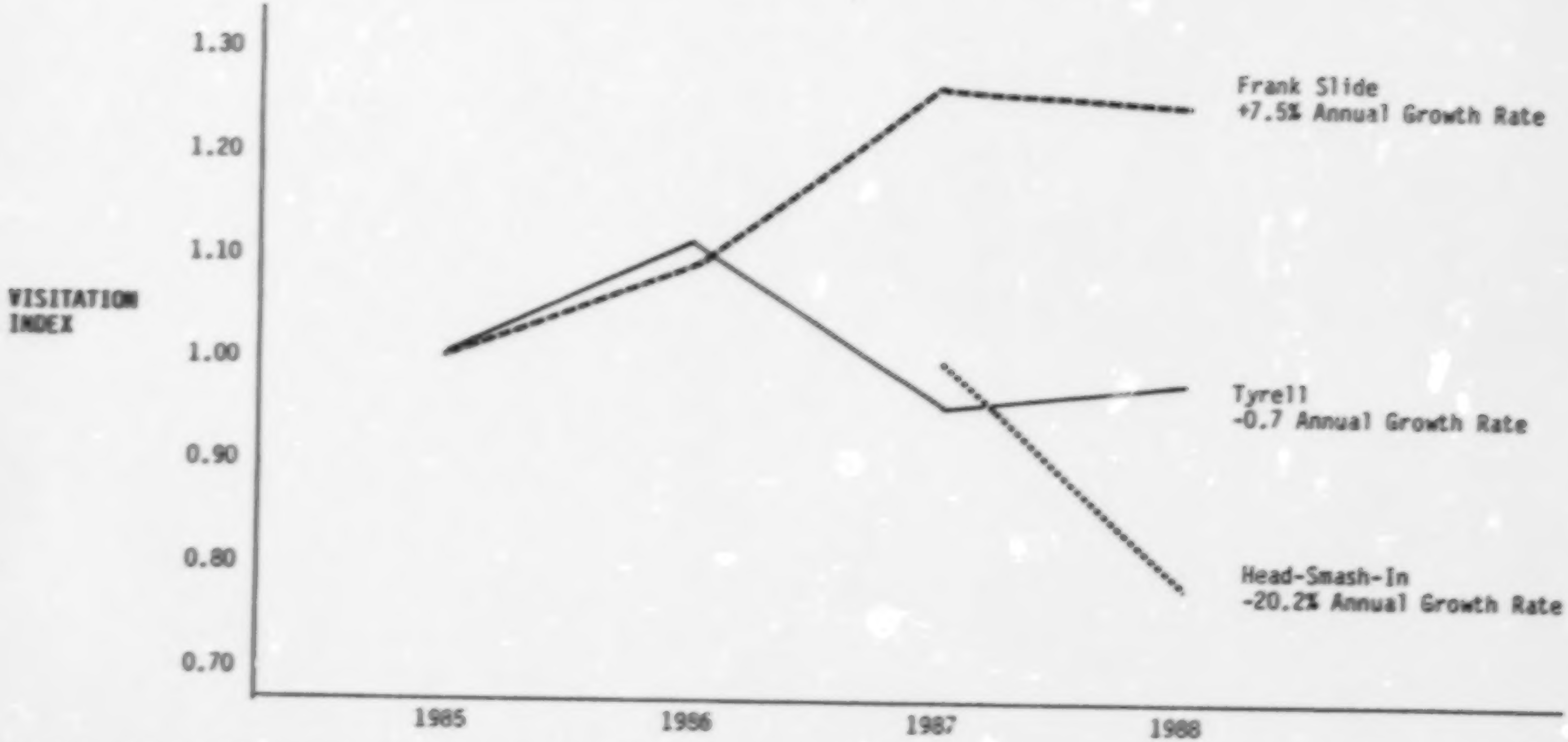
5.4 REMINGTON CARRIAGE MUSEUM VISITATION PROJECTION

5.4.1 Development Proposal Projections

The 1986 Development Proposal (which was prepared by the Remington Carriage Collection Steering Committee) included annual visitation estimates for the proposed interpretive centre. The total annual potential market of visitors for the proposed interpretive centre was estimated at approximately 1,500,000 persons. The Steering Committee assumed that the proposed facility could capture some 12% of the total potential market in its first year of operation; this capture rate would yield a first year visitation total of approximately 180,000 persons. Visitation was projected to increase in

EXHIBIT 5-11

Visitation Trends at Major Southern Alberta Interpretive Centres



The Visitation Index is the annual total visitation estimate divided by the facility's opening year annual visitation estimate

Source: Derived from Alberta Culture visitation statistics.

the following years of operation at an annual rate of 11%, which would yield the annual visitation levels depicted in the table below:

Steering Committee Visitation Projection

YEAR OF OPERATION	NUMBER OF VISITORS
1	180,000
2	199,000
3	221,000
4	246,000
5	273,000
5 Year Average:	224,000

5.4.2 Revised Projections

The development proposal visitation projections discussed in the preceding section are revised in this section, taking into consideration newly-available data. While it is recognized that the Remington-Alberta Carriage Collection is of "world-class" quality, it is the Consultant's opinion that the initial visitation projections are unduly optimistic for the purpose of calculating economic impacts and investigating potential development opportunities resulting from the construction and operation of the museum. Several reasons suggest that a slightly more conservative visitation projection is appropriate:

- The data suggest that the majority of rubber-tired visitor traffic within the Chinook Country Zone is currently bypassing Cardston. While the travel distances required for most visitors to actually visit Cardston are small, the fact remains that the majority of the visitors to the zone will remain as **potential** visitors to the Cardston area.

- The visitation levels at other major interpretive facilities in Southern Alberta tend to be significantly lower than the initial projections for the Remington Carriage Museum.

- In comparison to the other major interpretive facilities in Southern Alberta, the Remington Carriage Museum will be a relatively specialized attraction. It is anticipated that the Remington Carriage Museum will provide a relatively narrow, but in-depth, interpretive experience in contrast to the more broadly-based appeal of the other attractions.

- Although no detailed profile encompassing all visitors to the Chinook Country Zone is currently available, the existing profile data (Canadian Travel Survey) suggests that the attained education and income levels of a large proportion of Zone visitors are lower than levels typically associated with visitors to cultural/historical interpretive facilities.

- As depicted graphically in Exhibit 5-11, the 11% annual growth rate in visitation employed in the initial projections has not been observed at the other major Alberta Culture interpretive centres in Alberta.

In light of the foregoing, a more conservative visitation projection for the Remington Carriage Museum has been developed. Assuming that the facility could capture 4% of the currently untapped potential market in Glacier National Park, 10% of the market in Waterton National Park, 25% of the available visitor market in the Cardston region, and 2% of the balance of the visitor market in the Chinook Country Zone, annual visitation at the Remington Carriage Museum would be on the order of 150,000 persons. The revised initial year and future operating year projections are contained in the table below:

Revised Visitation Projection

OPERATING YEAR	NUMBER OF VISITORS
1	150,000
2	165,000
3	170,000
4	175,000
5	180,000
5-Year Average	166,000

6.0 TOURISM DEVELOPMENT OPPORTUNITIES

6.1 INTRODUCTION

The ensuing section addresses the adequacy of the current level of supply of tourism products and services to meet the potential tourism market requirements. It is based on a synthesis of tourism inventory (supply) and tourism market (demand) data as previously detailed. This section also highlights opportunities for enhancements to the existing tourism resources and potential additions to the resource base resulting from the development of the Remington Carriage Museum.

6.2 ASSESSMENT OF CURRENT LEVEL OF SUPPLY

The current level of supply is assessed under the following headings: infrastructure, services and attractions.

6.2.1 Infrastructure

Utilities

- There are adequate levels of utility servicing throughout the region. In the primary zone communities of Cardston and Waterton, utility servicing systems do not pose constraints to additional development. Some sewer system capacity constraints exist in Magrath. Development in Waterton is severely constrained by the limited landbase within the Townsite.

Transportation Network

- The transportation network within the region is generally good with proposed upgrading programs addressing localized deficiencies. The planned upgrading of Secondary Highway 501, from Highway 4 to Cardston, will significantly enhance the tourist traffic potential.
- Given the narrow and unsurfaced shoulder conditions on most of the highways throughout the region, the addition of "turn-outs" in selected locations would greatly improve conditions for tourist traffic, particularly over-sized vehicles and trailers.
- Current poor intersection conditions necessitate the construction of a "turn-out" at the intersection of Highways 2 and 5.

Tourist Information/Signage

- The lack of a coordinated tourism signage program is a deficiency of significant proportions and is an impediment to full realization of tourism potential, not only in the Cardston region, but throughout the Province. It should be noted that there is no tourism signage along U.S. Highway 89, which is the major port of entry to the Cardston region. Further, directional signage within the region itself is inadequate. Without a comprehensive signage program, the tourism attractions and services within the region will remain a well kept secret. The CTAP Study identifies the need for a signage program and has identified specific action steps to be taken by the Cardston Tourism Committee. It is our contention that this matter is better addressed at the Zone or Provincial level.

- The Remington Carriage Museum, by virtue of its locational characteristics, will function not only as an attraction in its own right but as a regional distributor of visitor traffic. This critical function must not be under-estimated in the conceptualization and delivery of tourism information services at the museum. It is recommended that strong consideration be given to allocating additional space as well as providing as dynamic and stimulating a program as possible (for example, use of state-of-the-art, attention grabbing techniques which might include three dimensional mechanical models, sophisticated audio-visual techniques and other interactive modes).

- The current Travel Alberta information booth within St. Mary's is in need of upgrading, both in terms of the size of the facility and the size and location of the site. A larger site on the east side of Highway 89 at the junction of Going to the Sun Highway and U.S. Highway 89 would certainly enhance its functional efficiency.

Brochure/Advertising

- The need for high quality brochure material and the "packaging" of attractions and a targetted advertising strategy has been adequately addressed in the recently published Chinook Country Tourism Association Marketing Plan and the Cardston Community Tourism Action Plan.

Recreational Facilities

- There appears to be an adequate level of community recreational facilities to provide recreational opportunities for tourists. The most apparent deficiencies are within Waterton; however, given its constrained land base there are limited opportunities to rectify the situation.

6.2.2 Services

Hotels/Motels

- The primary study area has an excess capacity of approximately 2,500 hotel/motel room nights during the months of July and August. Assuming that 20% of the total number of visitors to the facility spend an additional night in the region, and assuming that 50% of the total annual visitation occurs during the months of July and August, the total excess peak period demand for fixed-roof accommodation is 3,075 room nights, with an average occupancy of two persons per room.

- With the assumptions employed, it is apparent that the available capacity of fixed-roof accommodation in the primary study area will not be sufficient to meet projected demand. However, it should be noted that off-peak occupancy levels are significantly lower, so that the off-peak over-supply situation will continue after the commencement of operations at the Remington Carriage Museum. Thus, the construction of additional accommodation units may not be financially feasible in the near term.

- Notwithstanding the surplus of supply, accommodation within the region - with the exception of selected facilities within Waterton and the secondary zone - is not of adequate quality. While price sensitive demand is being served, tourists who are seeking a higher quality experience may tend to bypass the area. Unfortunately, the low level of off-season visitation reduces the financial viability of higher amenity types of facilities.

- There is some scope to improve existing facilities within the primary zone. In addition, there is a good opportunity for the creation of more specialized accommodation products which offer unique experiences, i.e., bed and breakfast, guest ranches, etc.

Campgrounds

- Utilizing the methodology outlined in the previous section, with an average occupancy of 2.5 persons per site, it is calculated that the operation of the Remington Carriage Museum will result in additional demand for approximately 840 campsite nights during the peak period of July and August. During the same period, the excess capacity in the primary area exceeds 20,000 campsite nights. Thus, there is no requirement for the provision of additional campsites.

- However, from a qualitative standpoint, there is considerable latitude for upgrading existing facilities, i.e., provision of additional hookups, amenities and activities.

Restaurants

- Considerable scope exists for the provision of tourist-oriented food services. With the exception of Waterton and the Cobblestone Manor in Cardston, restaurants are not oriented to visitor requirements. A notable constraint with respect to restaurants in Cardston is that they do not have the capacity to handle large groups of visitors. In addition, the unavailability of alcoholic beverages will severely restrict Cardston restaurants' ability to capture a significant proportion of the visitor market.

- Good opportunities exist for the provision of unique eating experiences as well as seasonal specialty outlets such as ice cream and confections.

Retail Goods

- The wide variety of goods and services available in Lethbridge relative to other communities in the region is reducing the smaller community retailers' share of the market for DSTM (department store type merchandise). Although this reduced market share over time has led to some retail business failures in the region, a substantial excess of retail capacity remains. For this reason, increased tourism visitation generated by the Remington Carriage Museum will not require the development of new general retail outlets.

- However, it is probable that private sector opportunities in Cardston will be created for the provision of specialized, tourist-oriented retail outlets, i.e., sportswear, gifts/souvenirs, books/magazines, authentic crafts, etc.

Automobile Service

- Cardston and the other towns in the study area offer a variety of independent and manufacturer-affiliated major service facilities, in addition to a large number of fuel and minor service outlets. It is therefore anticipated that development and operation of the Remington Carriage Museum will not require additional automobile service facilities.

6.2.3 Attractions

- With the exception of Waterton Lakes National Park, the primary area has a limited number of attractions. Within Cardston, the Mormon Temple has the potential to become a major attraction; however, the Visitor Centre is currently under-utilized and under-promoted. The addition of the Remington Carriage Museum will be a significant enhancement to the region.

- The secondary area, including Lethbridge, Fort Macleod and Pincher Creek derives benefits from a clustering of attractions and contains the highest concentration of attractions within the Chinook Country Tourism Zone.

- Notwithstanding the addition of the Remington Carriage Museum, the secondary area will continue to exert a strong "pull" on visitors to the primary zone.

- Therefore, it will be necessary for the attractions in the immediate Cardston area to cooperatively develop packaging and promotional initiatives.

- At the same time, packaging and joint promotional efforts will benefit the entire zone.

- Achieving a critical mass of attractions within the primary zone will require a number of initiatives including:

  - enhancement of existing attractions;
  - packaging of existing attractions;
  - addition of attractions/activities; and
  - marketing and management of existing and proposed attractions.

- There is also a notable lack of activities, particularly night time activities, within Cardston itself. This deficiency will cause a loss of large numbers of museum visitors to other centres with an associated loss of potential accommodation and related expenditures. There is a requirement for the addition of attractions/activities/events that will encourage museum visitors to either extend their day use activities, stay over night or plan a return trip.

- With respect to activities/attractions, there is a major opportunity for staging equestrian-related activities and events at the Remington Carriage Museum. These could include;

  - heavy horse pulling contests;
  - trail riding club meets;
  - horse drawn fire wagon contests; and
  - show jumping, dressage and other related activities.

- A variety of ongoing events is critical to maintaining repeat visitation, as well as attracting visitation during the shoulder and off-peak seasons.

6.3 TOURISM DEVELOPMENT OPPORTUNITIES

The following section is devoted to an examination of potential tourism and related opportunities for the primary zone. It is based on a synthesis of data from the tourism inventory, the market assessment and the assessment of the quality and quantity of existing tourism services, infrastructure and attractions. These varied sources have helped guide the creative processes involved in identifying and articulating tourism development opportunities resulting from the Remington Carriage Museum.

Tourism development opportunities are summarized in Exhibit 6-1. Potential opportunity types are briefly described; where possible, specific locations are detailed along with operating sector/agency responsibility and priority with respect to implementation. Priority has been ranked from 1 to 5 with 1 being the highest priority.

6.4 DESTINATION RESORT OPPORTUNITIES

The family vacation destination resort plan, a concept program of Alberta Tourism, was identified as a potential private sector opportunity for Cardston. The typical resort, as envisioned by Travel Alberta, would serve as a "visitor destination", providing complete services for tourists, including overnight facilities and recreation facilities. Specifically, these could include serviced and unserviced campsites, group camping area, playgrounds, tennis courts, golf course, interpretive centre, water-based recreation opportunities, service station, trailer/car rentals, etc.

Two potential sites were identified; one immediately adjacent to the tourism generator facility and the other to the south, just outside the current Town boundary. See Exhibits 6-2 and 6-3.

The first site is municipally-owned river valley land adjacent to the existing municipal campground along Lees Creek. The scenic location, immediate proximity to the Remington Carriage Museum and the existing facility development (including playing fields, tennis courts, picnic sites and the outdoor swimming pool situated just to the north of the Creek on 4th Avenue) make this a desirable area for the location of a vacation destination resort. Further, the location of the Cardston Golf Course situated immediately to the south along Lees Creek enhances the attractiveness of this location. Two constraints relate to the small size of the proposed municipal campground (20 acres) and the fact that the creek valley lands in the immediate area are intended by the Town as natural open space. Conceptualization of a family destination resort within this location envisions utilitization of these public facilities by tourist visitors to the area.

Discussions of this concept with the Town Recreational Administrator revealed that the Town may be amenable to this type of proposal and, at this point, does not envision a conflict in terms of tourist/public use of these facilities. One strategy envisions the Municipality retaining ownership to the lands and leasing out the operation of the family destination resort to a private operator.

Exhibit 6-1

TOURISM DEVELOPMENT OPPORTUNITIES

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
INFRASTRUCTURE					
Information	• Comprehensive information/directional signage program - both external to region and within primary and secondary zone. Includes signage to list/highlight some of the major attractions as well as directional signage within the region. Signage should employ consistent graphic format. • More comprehensive information signage might take the form of a roadside pull-off with large-scale map and additional detail on individual attractions. Site could also include picnic benches, landscaping, etc.	• St. Mary, Montana junction of "Going to the Sun" Highway & U.S. Highway 89. • Junction of U.S. Highway 89 & 17. • Strategic locations within primary and secondary zone, Waterton in particular. • Preferred location would be immediately north of Carway.	Travel Alberta	1	
Information	• Upgrading of current Travel Alberta information booth in St. Mary. Increase size of facility; move facility to east side of Highway 89.	• St. Mary, Montana junction of "Going to the Sun" Highway and U.S. Highway 89.	Travel Alberta/Chinook Country Tourist Association	2	
Information	• Brochure of attractions/tours within primary and secondary zone.	-	Joint effort between Travel Alberta, Chinook Country Tourism Assoc., Cardston Tourism Board	2	
Information	• Major identity feature at entrances to Cardston - could take form of an elevated carriage/prairie schooner	• At intersection of Highways 5 and 2, at north end of Town and at southern entry	Cardston Tourism Board/ Chamber of Commerce	2	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
	In a landscaped setting. Reinforces identity and theme of tourism attraction as well as providing photo opportunity.	to Town along Highway 2.			
Highways/Roads	• Upgrading of selected roads, widening of shoulders, inclusion of turn-outs.	• Highway 2 & 5, intersection of 2 & 5. • Other selected locations throughout region.	Alberta Transportation	2 - 3	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
SERVICES					
Restaurants	• Opportunities for upgrading of existing restaurants including decor and menu. Expansion of facilities to allow for tour bus groups.	• Primary opportunities in Cardston and Waterton. • Some possibilities within rest of primary zone.	Private	1 - 2	• Requirement for existing food services to tap expected increased visitation.
	• Opportunities for creation of unique eating experiences, themed restaurants.		Private	2 - 3	
	• Carriage ride from museum to restaurant in order to maximize tourism experience and provide linkage with carriage theme.	• Within Cardston or in immediate outskirts of town.	Private	3	
	• Creation of unique and specialty menu items "Carriage Driver's Lunch" similar to "Ploughman's Lunch".			3	
	• Opportunities for seasonal specialty outlets, i.e., ice cream and confections.	• Downtown Cardston.	Private	2	
Accommodation	• Opportunities for more unique accommodation catering to increased seasonal traffic. Bed and breakfast variety accommodation in older homes, farm houses, etc.	• Within primary area - scenic location with natural amenities preferred, western part of primary zone, mountain views.	Private	1 - 2	
	• Opportunity for guest ranch accommodation catering to longer stays but still aimed at seasonal market. Provides continuity in terms of equestrian theme.	• Within primary area.	Private	1 - 2	• Would require more detailed market studies to determine feasibility.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
Campgrounds - St. Mary's Reservoir	• Upgrading of environment through extensive tree planting program to provide screening and shelter.	• Adjacent to day use area and other activity areas.	Alberta Environment	3	• Required to provide high quality recreational experience for regional users.
Movie Theatre	• Re-opening of existing movie house in downtown Cardston to provide night time activity for visitors.	• Downtown Cardston.	Private	2	
Amusements	• Miniature golf, amusement/entertainment complex, again to broaden base of tourist activities.	• Preferred location adjacent to or in conjunction with Municipal campground.	Private	2 - 3	
Specialty Merchandise	• Opportunities for provision of specialty and tourist-oriented merchandise, i.e., gifts and crafts, fine art, specialty clothing items, i.e., western. • Opportunities for specialty outlets, i.e., art gallery, specialty book store, antique store or combinations of the same.	• Cardston and Waterton with some opportunities within the secondary impact zone.	Private	3 - 4	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
ATTRACTIONS					
Summer Theatre	• Prime opportunity to provide summer theatre as a means of supplementing night time activity. Matinee performances catering to tour buses. • A number of possibilities exist with respect to fare - western themed as in Fort Steele, repertory group to perform light entertainment (musical comedies, etc.). Dinner theater is another possibility, particularly if venue is located at the Civic Centre which has a full service kitchen.	• Civic Centre, Cardston.	Private	2	• Municipality or Tourism Board to tender.
Carriage Rides/ Tours	• Carriage tour of Cardston's historic landmarks.	• Staged from Remington Carriage Museum.	Friends of the Remington, leased to private operator.	2	
	• Carriage ride along extended trail system, i.e, stage coach ride along Lee Creek.	• Staged from Remington Carriage Museum.			
	• Extended trail ride out into rural area.	• Staged from Remington Carriage Museum.			
	• Small van tours throughout primary area, 1 and 2 hour durations to visit local/regional attractions.	• Staged from Remington Carriage Museum.	Friends of the Remington, leased to private operator.	2	• Requires packaging.

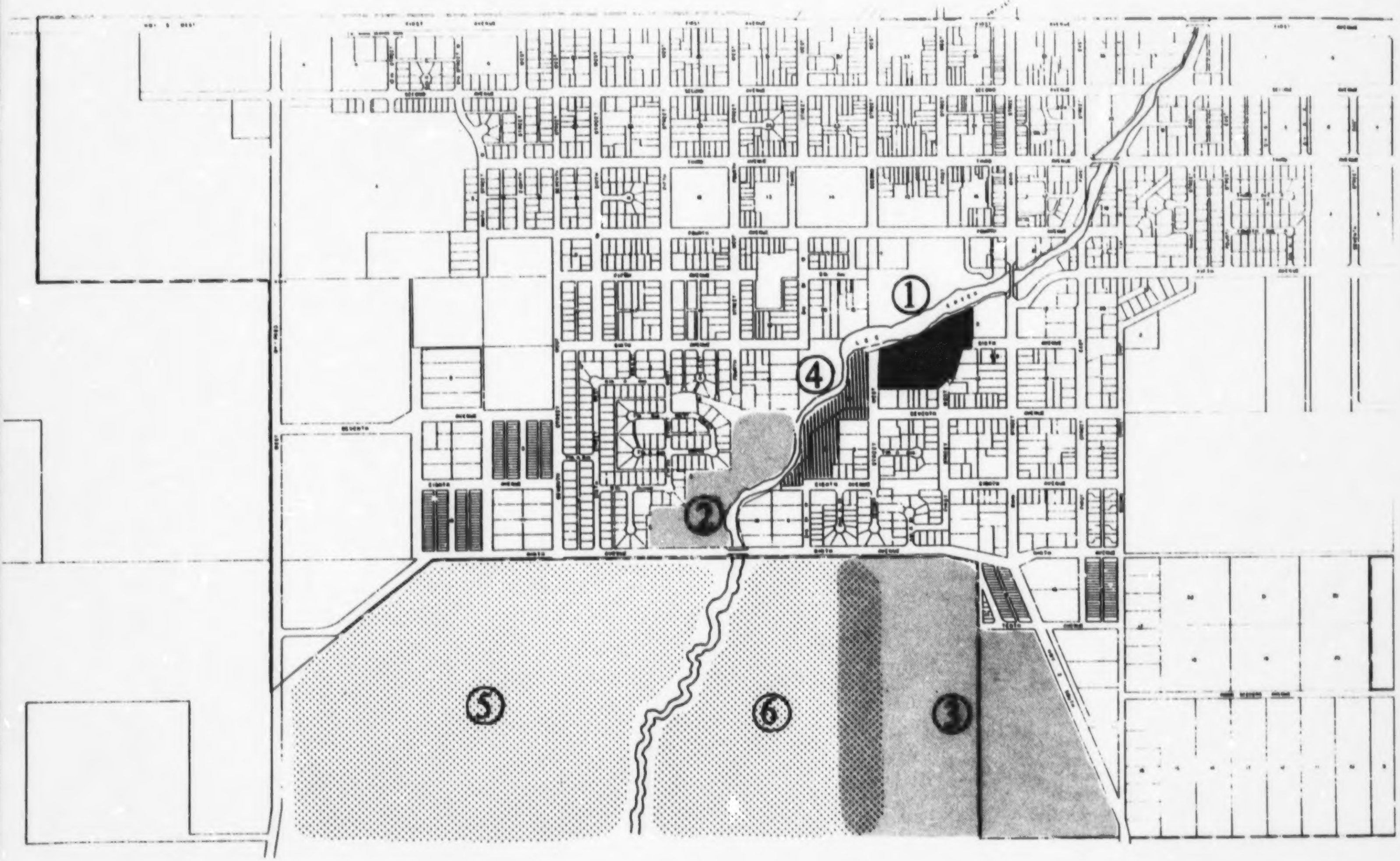
OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
Campgrounds - St. Mary's Reservoir	• Upgrading of environment through extensive tree planting program to provide screening and shelter.	• Adjacent to day use area and other activity areas.	Alberta Environment	3	• Required to provide high quality recreational experience for regional users.
Movie Theatre	• Re-opening of existing movie house in downtown Cardston to provide night time activity for visitors.	• Downtown Cardston.	Private	2	
Amusements	• Miniature golf, amusement/entertainment complex, again to broaden base of tourist activities.	• Preferred location adjacent to or in conjunction with Municipal campground.	Private	2 - 3	
Specialty Merchandise	• Opportunities for provision of specialty and tourist-oriented merchandise, i.e., gifts and crafts, fine art, specialty clothing items, i.e., western. • Opportunities for specialty outlets, i.e., art gallery, specialty book store, antique store or combinations of the same.	• Cardston and Waterton with some opportunities within the secondary impact zone.	Private	3 - 4	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
ATTRACTIONS					
Summer Theatre	• Prime opportunity to provide summer theatre as a means of supplementing night time activity. Matinee performances catering to tour buses. • A number of possibilities exist with respect to fare - western themed as in Fort Steele, repertory group to perform light entertainment (musical comedies, etc.). Dinner theater is another possibility, particularly if venue is located at the Civic Centre which has a full service kitchen.	• Civic Centre, Cardston.	Private	2	• Municipality or Tourism Board to tender.
Carriage Rides/ Tours	• Carriage tour of Cardston's historic landmarks.	• Staged from Remington Carriage Museum.	Friends of the Remington, leased to private operator.	2	
	• Carriage ride along extended trail system, i.e, stage coach ride along Lee Creek.	• Staged from Remington Carriage Museum.			
	• Extended trail ride out into rural area.	• Staged from Remington Carriage Museum.			
	• Small van tours throughout primary area, 1 and 2 hour durations to visit local/regional attractions.	• Staged from Remington Carriage Museum.	Friends of the Remington, leased to private operator.	2	• Requires packaging.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
Programming & Interpretive Considerations	• Interactive exhibits, simulated rides, actual rides in horse-drawn conveyances, demonstrations and a variety of special events are programming essentials, which along with creative target marketing will be the critical factors in ensuring the facility's success.	• Improvements to programming at facilities listed, tours could be staged from the Carriage Museum.	Alberta Culture, Friends of the Remington	1	• The travelling public expects a high quality, interactive interpretive experience. To maximize the potential first time and repeat visitation - particularly in the shoulder and off-season, the Remington program must emphasize interaction, activity and special events. A multi-media production and static exhibits are not sufficient.
Remington Carriage Museum	• Opportunities for the inclusion of revenue generating activities within the Carriage Museum including:				
	Simulator: - Number of possibilities exist with respect to theme - one envisions a stage coach ride/chase.	• Interpretive Gallery	Friends of the Remington, Alberta Culture, lease to private operator.	3	
	Photography: - Opportunity for photography booth which might include period costume shots around various types of carriages.	• Space leased to operator, either within main building or somewhere on the site. Alternatively, the studio could be established within the downtown, although the museum is the obvious first choice in terms of a location.	Friends of the Remington, Remington, lease to private operator.	3 - 4	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
Remington Carriage Museum (continued)	Video Postcards: - This could be operated in conjunction with the photography studio. Essentially it allows the visitor to purchase a cassette to send home with a short video and audio message featuring the visitor.	• Museum grounds.		3 - 4	
Interpretation	Mormon Interpretation • Cardston and district was settled by the Mormons; a cultural/historical theme of national/international interest. Considerable opportunity exists to enhance and extend this theme's interpretation to the visiting public. • Consequently, opportunities exist for enhancing existing interpretation facilities and programming, and also for extending interpretation of Mormon settlement into the surrounding district through self-guided or guided auto/	• Improvements to programming at facilities listed, tours could be staged from the Carriage Museum.	Friends of the Remington, Cardston Tourism Community, Mormon Community	2 - 3	• In Cardston, the Card House, the Courthouse Museum and the Visitor Reception Centre at the Mormon Temple all deal with aspects of the Mormon story, but not within a coherent, thematic structure or consistent manner. In none of these facilities does the visitor get a holistic view of the Mormon settlement and activities in Southern Alberta.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/AGENCY	PRIORITY	COMMENTS
Interpretation (continued)	mini bus tours. For example, the key role the Mormons played in establishing the St. Mary's irrigation system as represented in the Kimball Headworks and other remains of the original St. Mary's system - the first and oldest of their kind in Alberta.				
	Other Cultural/Historical Interpretation • Other cultural/historical sites, interpretive themes and opportunities exist in the region. For example, the Northwest Mounted Police, whiskey trade and Native reserve and pre-reserve sites. Some of the sites are of Provincial and national significance. Cardston and district also contains a number of geological, biological and ecological sites/areas of Provincial and national significance.	• Primary and secondary zone. • Again, tours could be staged from the Remington Carriage Museum.	Cardston Tourism Board/ Travel Alberta	4 - 5	• Co-operating local association (e.g., Friends of the Remington) could offer guidebooks and souvenir publications including other attractions.



Town of Cardston

Destination Resort Sites

LEGEND

1 Site for Remington Carriage Museum
2 Potential expansion area for family destination resort site #1
3 Potential family destination resort site #2
4 Proposed campground expansion
5 Golf Course
6 Possible golf course expansion

IBI
GROUP

REMINGTON CARRIAGE MUSEUM
Tourism Destination Resort Plan

EXHIBIT
6-2

Lawrence Kearl lands for potential Destination Resort Plan Site
- looking east across Lees Creek from golf course clubhouse

Cardston - golf course looking southeast from clubhouse on 4 Avenue

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REMINGTON CARRIAGE MUSEUM
Tourism Destination Resort Plan

EXHIBIT
6-3

Lions Park - looking southwest from 4 Avenue

Lions Park - looking west from north side of Lees Creek

The second site reviewed is located south of and immediately adjacent to the Town boundary. The approximately 100 acre parcel is privately owned and includes higher elevation table lands (approximately 20 acres) that are within the Town boundary with the remainder comprised of sloping and bottom lands associated with the floodplain of Lees Creek. A narrow strip of privately owned land separates this parcel from Lees Creek to the west.

The owners of the 100 acre parcel have indicated some interest in developing their land for a tourism-oriented use. Some preliminary site feasibility work was undertaken ten years ago, when an engineering study involving contours, slope analysis and servicing potential, was done as part of a tentative plan of subdivision. The work was for the development of residential lots and a recreational man-made lake.

The Cardston Golf Course, a 9-hole facility is situated to the west of the site on the other side of Lees Creek. The golf course is owned by the Municipal District but is operated as a public course by the Cardston Golf Club. There are long range plans for expansion of the golf course to 18 holes. This expansion would logically take place on the private lands on the east side of the Creek and would in all likelihood include a portion of the 100 acre parcel.

Although not located adjacent to the Remington Carriage Museum site, there is a natural tie-in of this potential site through the Lees Creek open space system.

7.0 ECONOMIC IMPACT OF REMINGTON CARRIAGE MUSEUM

7.1 INTRODUCTION

The capital expenditures required to construct the Remington Carriage Museum, the operating costs associated with the functioning of the facility, and the expenditures made by visitors to the facility will have significant impact on the economies of Cardston, the Chinook Country zone, and the province. The purpose of this section is to attempt to quantify the economic impacts associated with the development and operation of the Remington Carriage Museum. It should be noted that these impacts are considered to be incremental, that is, it is assumed that no capital expenditures would be made, nor revenues from visitors generated if the proposed facility was not constructed.

The economic impact of the construction and operation of the Remington Carriage Museum includes direct expenditures, indirect effects, and induced effects. For the purpose of this report, these economic impacts are calculated as additions to household income, and as equivalent person-years of full-time employment. It should be noted that the calculation of economic impact is absolute rather than regional; the calculated benefits account for leakages from the provincial economy, but are not allocated intraprovincially.

7.2 INPUTS

The capital cost estimate for construction of the Remington Carriage Museum is $9,015,000. That figure includes research, planning and design, facility construction, landscaping, and furnishings, but excludes site acquisition costs and the value of the Carriage collections. The land and Carriage collection costs (estimated at $3,600,000 in total) are excluded from the economic impact analysis because they represent transfers of assets, and as such are not incremental expenditures.

Annual operating costs for the Remington Carriage Collection have been estimated at $795,000. That figure includes salaries and benefits for 10 person-year equivalents of employment, maintenance costs, utility costs, and promotional and interpretive costs. The entire operating cost estimate is considered an incremental expense, and is therefore included in the economic impact analysis. The operating costs are recurring annual costs.

As detailed in Section 5, it is estimated that 150,000 visitors will attend the museum during its initial year of operation. Of that total number of visitors, it is estimated that 30,000 (20%, or 1/2 of the Chinook Country average rate) will stay overnight in the Chinook Country zone, while 120,000 (80%) will be day visitors. The reduced overnight rate was utilized because it is probable that a significant number of the museum visitors will already be overnighting in the zone, and because the visitation at the facility is assumed to be incremental.

It is also assumed that day users will spend $8.00 per day on average, while overnight visitors will spend $30.00 per day on average. The per capita expenditure estimates reflect the levels observed in Waterton Lakes National Park, and the inflation-adjusted estimates from the Canadian Travel Surveys and the Chinook Country Tourism Destination Area Study. The average per capita estimate employed is 5% higher in real terms than the estimate employed in the 1986 Development Proposal Study. The total annual incremental visitor expenditure estimate is therefore $1,860,000, as detailed in Exhibit 7-1.

7.3 INCOME AND EMPLOYMENT IMPACTS

The construction and operation of the Remington Carriage Museum and associated visitor expenditures will have a direct impact on the household income and employment of workers in construction, tourism and related industries. The one-time expenditure of approximately $9,000,000 for capital costs, and the recurring annual operating related expenditures of approximately $2,600,000 are an incremental flow of income into the provincial economy.

However, the initial direct expenditures create additional expenditures in the economy through the multiplier effect. Indirect economic effects are generated when the direct expenditures cause increased levels of production in the supplying industries upstream of the industries which benefited from the direct expenditures. In addition, as the direct and indirect expenditures on goods and services ripple through the economy, a portion of each benefiting household's income is re-spent, which in turn induces additional expenditures at each step. Leakages from the provincial economy occur at each transaction, and are accounted for in the multipliers employed.

Absolute or provincial scale multipliers have been employed to estimate the value of indirect and induced household income from the direct expenditures for construction and operation of the museum. These absolute multipliers

Exhibit 7-1

Estimated Annual Incremental Visitor Expenditures

DURATION	NUMBER OF VISITORS	EXPENDITURE PER VISITOR	TOTAL EXPENDITURE
Day Use	120,000	$ 8.00	$ 960,000
Overnight	30,000	30.00	900,000
TOTAL	150,000*	$12.40	$1,860,000

* Based on initial operating year visitation estimate.

(with an equivalent regional average of 1.9) were employed in preference to regional multipliers because direct household income and employment effects had to be estimated from the total identified direct expenditures.

Exhibit 7-2 details the economic impact of the Remington Carriage Museum construction and operation. As indicated in that exhibit, construction of the facility is estimated to generate $5,800,000 in total household income, and provide approximately 200 person-years of employment. In addition to the one-time economic effects associated with construction of the facility, its on-going operation is calculated to generate $3,600,000 in household income, or approximately 150 person-years of employment annually. These economic benefits will accrue to the provincial economy.

Although it is difficult to determine the primary impact zone's share of the identified benefits, it is probable that the zone will capture the majority of the employment generated by the construction and operation of the Remington Carriage Museum. With a 50% capture rate, the construction of the facility would provide 103 person-years of employment in the zone, and add some $2,900,000 to local household income.

In addition to the substantial one-time benefits generated from capital expenditures, the primary impact zone will capture the majority of the economic benefits from the on-going operation of the facility. With a 70% capture rate, the visitor expenditures and facility operation expenditures would generate 109 person-years of employment annually in the zone, and add some $2,500,000 to local household income each year.

Exhibit 7-2

Economic Impact of the Remington Carriage Museum

	Capital Expenditure Generated[1]	Operating Expenditure Generated[2]
Direct		
Household Income	$3,000,000	$1,900,000
Employment[3]	100	90
Indirect/Induced		
Household Income	$2,800,000	$1,700,000
Employment[3]	105	65
Total		
Household Income	$5,800,000	$3,600,000
Employment[3]	205	155

1. Includes pre-operational planning costs and facility capital costs, excluding land and carriage collection costs.

2. Based on visitation estimate of 150,000. Includes visitor expenditures and facility operating expenditures.

3. In person-years, with direct capital expenditure incomes estimated at $30,000 per annum, direct operating expenditure incomes estimated at $21,000 per annum, and indirect effect incomes estimated at $26,500 per annum.

APPENDIX A:

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APPENDIX A

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APPENDIX B:

Contacts

APPENDIX B

LIST OF PERSONAL CONTACTS

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13. Doug Clark, Alberta Environment, Lethbridge.
14. Greg Burt, Recreation Director, Town of Cardston.
15. Leo Stutz, Curator, Courthouse Museum, Cardston.
16. Louise Heric, Project Coordinator, Heritage Fort Macleod.
17. Mr. D. Harvey, Kilmorey Lodge, Waterton.
18. Frank Dietrich, Foothills Motel, Fort Macleod.
19. Operator, Heritage Inn Motel, Pincher Creek.
20. Alberta Hotel Association.
21. Alberta Parks and Recreation, District Office, Vulcan.
22. Operator, Holiday Trailer Park, Cardston.
23. Operator, Cobblestone Manor, Cardston.
24. Rod Bly, Development Officer, Town of Magrath.

APPENDIX C:

Tourism Services and Attractions

APPENDIX C

TABLE OF CONTENTS

PAGE

TOURISM SERVICES

Primary Study Area

Cardston - hotels/motels 1
- restaurants 1
- campgrounds 2

Waterton - hotels/motels 3
- restaurants 5
- campgrounds 6

Region - campgrounds 8

Magrath - restaurants 9
- campgrounds 9

Secondary Area

Pincher Creek - hotels/motels 9
- campgrounds 9

Fort Macleod - hotels/motels 10
- campgrounds 10

Lethbridge - hotels/motels 11
- campgrounds 12

TOURISM ATTRACTIONS

Primary Study Area

Cardston - Man-made 13
- Natural 14
- Events 14

Waterton - Man-made 15
- Natural 15
- Events 16

Region - Man-made 17
- Natural 18

Magrath - Man-made 19
- Natural 19
- Events 19

TOURISM SERVICES - Cardston (Primary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION		FACILITIES	DEVELOPMENT/ENHANCEMENT	
					MARKET	OCCUPANCY		POTENTIAL	CONSTRAINTS
HOTELS/ MOTELS	Evergreen Motel	In Cardston (Hwy 2 & 5 junction)	12 motel units 3 cabins	$33 - $45	1- Banff/ Jasper bound 2- U.S. tourists 3- Waterton overflow 4- Alaska Hwy bound - majority tourists during peak season - business and Mormon visitors during shoulder and off-seasons	- 30% - 70% shoulder season; - 10% - 20% off-season; - 80% - 90% peak season.			
	Flamingo Motel	South end of Cardston on Main Street.	38 units	$32 - $40			- Outdoor pool.	- Recently upgraded. - New addition.	
	Trails End Motel	South end of Cardston on Main Street.	27 units	$34 - $45					
RESTAURANTS	Cobblestone Manor	173-7th Ave. W.	85 person capacity		- bus tour business increasing - local, regional in off-season	- fully booked in peak season - poor business in shoulder & off-season		- Could double capacity by expanding into additional portion of building.	
	Voyager Restaurant	256 Main Street	15 - 20 tables						Limited size restricts ability to accommodate
	Dairy Queen	Main Street	30 - 40 tables						

TOURISM SERVICES - Cardston (Primary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION		FACILITIES	DEVELOPMENT/ENHANCEMENT	
					MARKET	OCCUPANCY		POTENTIAL	CONSTRAINTS
RESTAURANTS (contined)	Franky's Pizza	279 Main Street	15 - 20 tables					-	large groups (e.g. bus tours)
	Grotto Pizza	Near Highway 5 and 2 Junction	+15 tables					-	
	Dineaway Rest.	207 Main Street	+15 tables					-	
	Burger Hut	Main Street	10 - 15 tables						
	Carriage Hall Restaurant	Main Street	±20 tables						
CAMPGROUNDS	Lees Creek Municipal	South end of Cardston, adjacent to Centennial Park and proposed Remington site.	26 sites, open May to October (serviced and unserviced)	$3.00	- approximately 70% tourist users (pass through) & 30% Temple/ Cardston visitors	- 600 to 800 vehicle units/year - seasonal (May-Oct) average occupancy of 40% - 60% - 80% occupancy July/August	R.V. sewage disposal, some serviced hook-ups, flush toilets.	- tentative (2 years) Town plans for expansion/ relocation of most present sites - several hectare adjacent site designated for potential expansion (additional 10-15 sites) - will be fully serviced	- seasonal
	Holiday Trailer Park (privately operated)	North end of Cardston, 2 blocks east of Main Street.	17 fully serviced sites (open April to October)	$8.00	- mostly visitors for local/ regional events - some pass-through tourists - a few long-term visitors (monthly)	- 10% average occupancy for season - 30% to 40% occupancy July/August	- power, water, sewage hook-ups		- seasonal - no plans for expansion

TOURISM SERVICES - Waterton (Primary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION		FACILITIES	DEVELOPMENT/ENHANCEMENT	
					MARKET	OCCUPANCY		POTENTIAL	CONSTRAINTS
HOTELS/ MOTELS	El-Cortez Motel	In Waterton.	34 units	$30 - $45		Virtually 100% occupancy during July/Aug.			- seasonal (May to Sept.)
	Crandell Mtn. Lodge	In Waterton.	12 lodge units	$40 - $80		Virtually 100% occupancy during July/Aug.		- doing some renovations	- seasonal (Apr. to Oct.)
	Aspen-Windflower Motels	In Waterton (off Main Street).	53 motel & bungalow units	$46 - $73		100% occupancy during July/August.	Some kitchenettes, lounge, dining room. Two motels adjacent to each other, combined under single ownership.		- seasonal (Apr. to Oct.)
	Bayshore Inn	In Waterton on Main Street (adjacent to lake).	70 units	$66 - $75	Significant group tour business.	95% to 100% occupancy during July and August.	Some kitchenettes, meeting/ convention centre, gift shop, tavern, whirlpool.	- recent upgrading - only convention facilities	- seasonal (May to Oct.)
	Prince of Wales	Just outside Townsite (1/2 km north).	81 rooms	$70 - $85	Tend to be elderly U.S. tourists. Mostly bus tour groups.	Occupancy through July/ Aug. is 100%.	Gift shop, lounge, dining room.		- seasonal (June to Sept.)

TOURISM SERVICES - Waterton (Primary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION		FACILITIES	DEVELOPMENT/ENHANCEMENT	
					MARKET	OCCUPANCY		POTENTIAL	CONSTRAINTS
HOTELS/ MOTELS (continued)	Northland Lodge	South end of Waterton (out of commercial zone).	7 units	$25 - $50	Regional (return visitors).	Virtually 100% occupancy during July/Aug.	Kitchenette units.		- seasonal (June to Sept.)
	Kilmorey Lodge	On main access road at entry to townsite.	25 units	$48 - $69	Peak season: - couples/ families - tour groups	100% occupancy in July and August; 90% in shoulder season; 20% to 60% during off season.	Gift shop, winter meeting rooms, lounge, dining room.	- historic old structure - recent upgrading - open year-round	

TOURISM SERVICES - Waterton (Primary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION		FACILITIES	DEVELOPMENT/ENHANCEMENT	
					MARKET	OCCUPANCY		POTENTIAL	CONSTRAINTS
RESTAURANTS	Big Scoop	Waterton Ave.					- Takeout service		
	Koffee Shoppe	Waterton Ave.							
	Tootsies Ice Cream	Windflower Ave.			- local, regional market		- Takeout service		
	Pearl's Bakery	Windflower Ave.			- seasonal tourist market		- Takeout service	- need to up-grade quality of some existing food service operations.	- All but Lamp Post are seasonal operations
	Waterton Bakery	Windflower Ave.					- Takeout service		
	Tourist Cafe	Waterton Ave.	moderate (10-15 tables)				- Sit-down dining service		
	Pearl's Patio Cafe	Windflower Ave.	moderate				- Sit-down dining service		
	New Frank's Restaurant	Waterton Ave.	large (715 tables)				- Sit-down dining service		
	Zumburger Haus	Waterton Ave.	large				- Sit-down & take out service		
	Golf Course Restaurant	Golf course (off main Park Rd. north of Townsite)	large				- Sit-down dining service		
	Kootenai Fried Chicken	Windflower Ave.					- Takeout service		
	Lamp Post	Kilmorey Lodge	large				- Sit-down dining service	- open year-round	
	Pizza of Waterton	Fountain Ave.	small (<10 tables)				- Sit-down & take out service		
	Kootenai Brown Restaurant	Bayshore Inn	large				- Sit-down dining service		
	Prince of Wales Dining Room	Prince of Wales Hotel	large				- Sit-down dining service		

TOURISM SERVICES - Waterton (Primary Study Area)
(continued)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION		FACILITIES	DEVELOPMENT/ENHANCEMENT	
					MARKET	OCCUPANCY		POTENTIAL	CONSTRAINTS
CAMPGROUNDS	Belly River	In National Park.	24 sites (unserviced)	$6		- Under 50% average during season.	Shelter, playground.		- seasonal (mid-May to early October)
	Crandell Mountain	In Park (8 km west on Red Rock Canyon Rd. off Hwy. 5).	129 sites (unserviced)	$9		- 85% occupancy during season. - Close to 100% during July/Aug.	Flush toilets, R.V. sewage disposal.		- seasonal (mid-May to early September)
	Townsite	In Park (townsite location adjacent to lake)	240 sites (serviced and unserviced sites)	$8-$14		- 95% occupancy average during season. - 100% in July/Aug.	Showers, flush toilets, R.V. sewage disposal, shelter.		- seasonal (mid-May to early October)
	Crooked Creek (leased to Waterton Nat. History Assoc.	5 km. East of Park gate on Highway 5.	75 random sites (unserviced)	$7 - $8		- 45-65% July Aug. avg. - <5% shoulder season.	Winter camping, shelter, pump water.	- open year-round	- no hookup services
	Waterton Homestead (privately operated)	3 km. North of Park gate on Highway 6	250 sites (some fully serviced)	$12 - $15			Flush toilets, shelter, playground, snack bar, outdoor pool, laundry, boat launch, Jaccuzzi, phone, tap water.	- open year-round - facility expansion considered in 1988	

TOURISM SERVICES - **Waterton** (Primary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION		FACILITIES	DEVELOPMENT/ENHANCEMENT	
					MARKET	OCCUPANCY		POTENTIAL	CONSTRAINTS
CAMPGROUNDS (continued)	Waterton Riverside (privately operated)	5 km. East of Park gate on Highway 5	70 sites (serviced and unserviced sites)	$8-$10	- Waterton overflow - mostly Alberta visitors - mix of tents & R.V.'s	- 60% to 75% for July and August - some 100% weekends - 5% to 10% during shoulder season	Groceries, tap water, shelter, playground, flush toilets.	- weekly entertaiment for regional & tourist market - expand facilities	- seasonal (mid-May to mid-September) - limited expansion room in river valley

TOURISM SERVICES - Region (Primary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION		FACILITIES	DEVELOPMENT/ENHANCEMENT	
					MARKET	OCCUPANCY		POTENTIAL	CONSTRAINTS
CAMPGROUNDS	St. Mary's Reservoir (operated by Alberta Environment)	About 20 km N.E. of Cardston (below dam). - gravel road off of Hwy.5	40 - 50 sites (unserviced)	No charge.	Local and regional visitation	80%-90% full on good weather summer weekends.	Playground, shelter, washrooms.		- seasonal (Apr. - Oct.) - unserviced sites - no advertising signage
	Yarrow Creek (Alberta Transp.)	2 km north of Twin Butte.	8 sites (unserviced)	No charge.			Shelter.	- Scenic location close to Waterton Park. - Open year-round.	
	Spring Glen Park (Municipal)	2 km N.E. of Hamlet of Hill Spring off Secondary Road 505.	30 sites (estimate only)	No charge.			Shelter.	- Seasonal.	
	Police Outpost Prov. Park	33 km south and S.W. of Cardston. Access from Highway 2 or 5.	46 sites (year-round)	No charge.	95% Alberta origin (5% U.S. origin).	1988 avg. campground use: - daily 16% - weekend 35% - some 100% weekends	Boat launch, phone, pump	- campground facilities upgraded in 1988 - scenic location	
	Woolford Prov. Park	16 km east of Cardston. Access off gravel-surfaced side road.	30 sites (year-round)	No charge.	100% Alberta origin.	Decreasing campground use as opposed to day use. Average daily of 5% occupancy; 11% on weekends.	Tap & pump water, shelter, playground, unserviced sites.	- scenic location	- poor road surface access

TOURISM SERVICES - Magrath (Primary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION		FACILITIES	DEVELOPMENT/ENHANCEMENT	
					MARKET	OCCUPANCY		POTENTIAL	CONSTRAINTS
HOTELS/ MOTELS	None.								
RESTAURANTS		On Hwy 62 (Main St.)	6 tables.		Local.				
		On Hwy 62 (Main St.)	10 tables.		Local.				
CAMPGROUNDS	Municipal Jubilee Park Campground	South end of Magrath, adjacent to Highway 62 and Pothole Creek.	15 random sites.	No charge.		Virtually full on summer weekends.	Shelter, tap water, unserviced sites.	- Town will be upgrading existing washrooms and fencing area. - Will be adding 15 new sites.	- no present sewage hook-ups for sites - seasonal operation (May - Oct.)

TOURISM SERVICES - Pincher Creek (Secondary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION	FACILITIES
HOTELS/ MOTELS	Foothills Motel	On Hwy. 6 in Pincher Creek.	30 units	$32 - $40	- Most motels average occupancy of 85-95% during peak season. - Occupancy of 60-75% for yearly average. - Off-season 50-60%. - Shoulder season 70-85%.	Restaurant, sauna, whirlpool, kitchenettes.
	Heritage Inn	In Pincher Creek.	43 units	$37 - $46		Restaurant, tavern, lounge.
	Parkway Motel	On Hwy. 6 in Pincher Creek.	41 units	$25 - $33		Kitchenettes.
	Stardust Motel	On Hwy. 6 in Pincher Creek.	14 units	$24 - $34		Kitchenettes.
	Westcastle Inn	On Hwy. 6 in Pincher Creek.	17 units	$28 - $35		Kitchenettes.
CAMPGROUNDS	Beauvais Lake Prov. Park	19 km S.W. of Pincher Creek.	85 sites (unserviced)		- Open year-round.	Boat launch, shelter, R.V. disposal, playground.
	Castle River Prov. Park	11 km west of Pincher Crk.	38 sites (unserviced)		- Open year-round.	Shelter.
	Cleland's Trailer Park	In Pincher Creek.	12 sites (power, water)		- Seasonal.	Flush toilets, showers.
	Pincher Creek (municipal)	In Pincher Creek	20 sites (unserviced)		- Seasonal.	Shelter.
	Sleepy Hollow (private)	In Pincher Creek on Hwy 6.	60 sites (power, water)		- Seasonal. - Long-term occupancy by construction crews limits space avail. to tourists.	Flush toilets, shelter, R.V. disposal, playground.

TOURISM SERVICES - Fort Macleod (Secondary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION	FACILITIES
HOTELS/ MOTELS	Century II Motel	Main Street In Ft. Macleod.	14 units	$28 - $38	- Most motels operate at 80-90% average occupancy during peak season (mid-June to mid-Sept.) - ±60% average occupancy for shoulder season. - <50% average occupancy in off-season. - Summer visitation includes Alta-origin, U.S. tourists (Banff or Alaska-bound, east/west traffic.	Kitchenettes.
	D.J. Motel	In Ft. Macleod.	15 units	$26 - $36		Kitchenettes.
	Foothills Motel	In Ft. Macleod.	28 units	$35 - $52		Indoor pool, sauna, whirlpool, kitchenettes.
	Fort Motel	Main Street in Ft. Macleod.	14 units	$28 - $40		Kitchenettes.
	Heritage House Motel	In Ft. Macleod.	12 units	$34 - $38		Kitchenettes.
	Sunset Motel	On Hwy. 3 in Ft. Macleod.	22 units	$38 - $44		Kitchenettes.
CAMPGROUNDS	Daisy May (private)	In Ft. Macleod.	120 sites		Seasonal.	Pool, store, R.V. disposal, showers, flush toilets.
	Oldman River (Alta. Trans.)	3 km west of Ft. Macleod on Hwy. 3.	10 sites (unserviced)	No charge	Seasonal.	R.V. disposal, shelter.

TOURISM SERVICES - Lethbridge (Secondary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION	FACILITIES
HOTELS/ MOTELS	Bridge Townhouse Motel	On Hwy. 5 in Lethbridge.	37 units	$35 - $42	City-wide occupancy is estimated at 70% during the peak season and 30% during the balance of the year.	Pool.
	El Rancho Motor Hotel	On Hwy. 5 in Lethbridge.	106 units	$32 - $39		Indoor pool, restaurant, lounge.
	Flagstone Motel	On Hwy. 5 in Lethbridge.	23 units	$30 - $45		Kitchenettes.
	Heidelberg Inn	On Hwy. 5 in Lethbridge.	67 units	$42 - $47		Restaurant.
	Lethbridge Lodge	On Hwy. 4 in Lethbridge.	191 units	$65 - $67		Indoor pool, restaurant, tavern, whirlpool, lounge.
	Lethbridge Travelodge	In Lethbridge.	33 units	$38 - $44		Pool, kitchenettes.
	Lodge Motel	In Lethbridge.	94 units	$37 - 50		Pool, sauna, whirlpool, restaurant, kitchenettes.
	Motel Magic	In Lethbridge.	75 units	$33 - $37		
	Park Plaza Motor Hotel	On Hwy. 5 in Lethbridge.	64 units	$34 - $42		Restaurant, tavern, lounge.
	Pepper Tree Inn	On Hwy. 5 in Lethbridge.	56 units	$34 - $42		Pool, whirlpool, kitchenettes.

TOURISM SERVICES - Lethbridge (Secondary Study Area)

	NAME	LOCATION	SIZE/ CAPACITY	COST	VISITATION	FACILITIES
HOTELS/ MOTELS (continued)	Sandman Inn	On Hwy. 5 in Lethbridge.	134 units	$52 - $60		Indoor pool, restaurant, tavern, sauna, lounge.
	Sundance Inn	On Hwy. 5 in Lethbridge.	54 units	$37 - $50		Indoor pool, kitchenettes.
CAMPGROUNDS	Henderson Lake (municipal)	In Lethbridge, off of Hwy. 5.	100 sites (power, water)		- Seasonal.	
	Lethbridge KOA (private)	2 km west of Lethbridge on Hwy. 3.	102 sites (power, water)		- Seasonal.	
	Park Lake Prov. Park	Coalhurst (15 km north of Lethbridge).	53 sites (unserviced)		- Open year-round.	

TOURISM ATTRACTIONS - Cardston (Primary Study Area)

	NAME	LOCATION	DESCRIPTION	SCALE	OPERATION	VISITATION		DEVELOPMENT/ENHANCEMENT	
						MARKET	USERSHIP	POTENTIAL	CONSTRAINTS
MAN-MADE	Buffalo Paddock	In Cardston, on Agridome grounds.	- outdoor paddock area with herd of 7 - 8 buffalo	- secondary attraction - importance rating of 1	- year-round	- local, regional			
	Mormon Temple	348 - 3 Street W. (four blocks west of Main Street)	- large granite structure built in 1913 - 1917 - only Mormon Temple in Canada (cultural/religious attraction - small visitor centre available	- major attraction of national recognition/importance - importance rating of 7	- year-round	- church members from B.C., Alta., Montana, N. Dak., Sask.	- approx. 120,000 per year	- current remodelling and new addition being built (restoration of original interior) - enhance interpretation	- no organized tours allowed at present for public
	Card Home	337 Main Street	- 1880's log home of founder of Cardston (historical attraction)	- secondary attraction of regional significance - importance rating of 3	- June to August 30th - volunteer staffing - 25¢ admission	- families and seniors-oriented - pass-through visitation	- approx. 1,300 - visitation constant over last several yrs.	- recent facility upgrading - enhance interpretation	
	Courthouse Museum	3rd Ave., between Main St. and 1st St. W.	- oldest courthouse in Alberta featuring pioneering, farming, arts, crafts, displays (historical attraction)	- secondary attraction (regional significance) - importance rating of 3	- June 1 to August 30th - tours can be arranged - 25¢ admission	- families and seniors-oriented	- approx. 800 - visitation	- some landscape upgrading potential - enhance interpretation	
	Cobblestone Manor	173-7th Ave. W. (adjacent to future Carriage Collection site)	- 1889 replica of old English manor (historical/dining attraction - used as restaurant - Alta.Historical Site	- secondary attraction of Provincial significance - importance rating of 5	- open year-round	- local, regional, provincial, national, international	- 1980-82: 25,000 to 30,000	- adjacent to proposed Remington Museum site	

TOURISM ATTRACTIONS - Cardston (Primary Study Area)

(continued)

	NAME	LOCATION	DESCRIPTION	OPERATION	SCALE	VISITATION		DEVELOPMENT/ENHANCEMENT	
						MARKET	USERSHIP	POTENTIAL	CONSTRAINTS
NATURAL	Lees Creek	Runs from S.W. to N.E. through centre of Cardston.	- scenic wide flood-plain and steep banked ravine - campground, municipal park and local recreational facilities	- year-round	- secondary attraction of local, regional significance.	- local, day use area - visitor use of camp-ground		- proposed Remington Collection site is adjacent to creek - Town plans for trail development	- limited trail development potential east of Hwy.2 due to adjacent private ownership/ development
EVENTS	Heritage Days	In Cardston, oriented around Agriplex facilities.	- regional and local fair	- held during first week of August	- major local and regional festivity - secondary attrac.	- local, regional	- 2,000 (1984) CCTDA	- permanent signage on Hwy. 2 at entry to Town	
	Rodeo		- Chinook Rodeo Assoc. ongoing competitions	- 6-8 events per year	- secondary attraction of local, regional significance.	- local, regional			
	Snafflebit Futurity		- Cutting Horse competition	- mid-summer	- secondary attrac- of regional, provincial attraction	- attracts competition from Canada, U.S.		- event is 1-2 years old - increasing popularity	
	Buffalo B.B.Q.	Held at Buffalo Paddock/ Agriplex		- Labour Day weekend - first year was 1988	- Secondary attraction of local, regional significance	- local, regional		- 1988 was first year; potential for growth with increased recognition over time	- held during beginning of shoulder season
	Theatre Group	Held at converted gymnasium in Municipal Civic Centre		- 2 week engagement once/year (usually in spring)	- Secondary attraction of local, regional significance	- local, regional		- in process of expanding to twice per year	

TOURISM ATTRACTIONS - Waterton (Primary Study Area)

	NAME	LOCATION	DESCRIPTION	OPERATION	SCALE	VISITATION		DEVELOPMENT/ENHANCEMENT	
						MARKET	USERSHIP	POTENTIAL	CONSTRAINTS
MAN-MADE	Heritage Centre	Waterton Ave.	- operated by a local heritage society	- seasonal	- secondary attraction of provincial significance - imp. rating of 5		72,000 (1987)		
	Buffalo Paddock	Inside north-eastern Park boundary (off of Highway 6).	- large, drive-through area, to view small buffalo herd in native habitat	- Year-round	- secondary attraction of provincial (provincial sig.) - imp. rating of 5		52,000 (1987)		
	Kootenai Brown Historic Site	Just northeast of Townsite, adjacent to lower Waterton Lake.	- 1/2 km trail to a headstone marking a historical site.	- Year-round	- secondary attraction (regional sig.) - imp. rating of 3		10,000 (1987)		
	Oil City Historic site	On the Akamina Hwy. within Park	- historical marker at location of Alberta's first oilwell.	- May - Sept.	- secondary attraction of regional significance - imp. rating of 1		26,000 (1987)		
	Prince of Wales Hotel	Adjacent to south end of townsite	- historic and architecturally interesting hotel	- Seasonal	- major attraction		161,000 (1987)		
NATURAL	Waterton Lake	Adjacent to Townsite, and extending north/south into Glacier Park.	- scenic/historic lake connection to Glacier (U.S.) National Park, featuring daily boat cruises.	- May - Sept.	- major attraction - imp. rating of 10				
	Cameron Falls & Lake	Lake, 16 km S.W. of the Waterton Townsite. Falls are adjacent to Townsite.	- scenic lake featuring available dayuse activities (canoes and paddleboat rentals, picnicing).	- year-round	- major attraction of national significance - imp. rating of 10		Falls: 156,000 Lake: 117,000 (1987)		
	Red Rock Canyon	17 km N.W. of the Townsite.	- dramatic water carved gorge of red coloured rock	- seasonal vehicle access	- major attraction of national sig. - imp. rating of 10		113,000 (1987)		

TOURISM ATTRACTIONS - Waterton (Primary Study Area)
(continued)

	NAME	LOCATION	DESCRIPTION	OPERATION	SCALE	VISITATION		DEVELOPMENT/ENHANCEMENT	
						MARKET	USERSHIP	POTENTIAL	CONSTRAINTS
EVENTS	Scenic Boat Cruises	Based out of Waterton Townsite	- 2 hour daily cruises on Upper Waterton Lake	- May - Sept.	- major attraction of national sig. - (7 - CCTAMP)		41,000		
	Beargrass Days	Waterton Townsite	- local celebration featuring parade, special events	- several days in late Aug.	- secondary attraction of local, regional significance.			- One of its primary objectives is to stimulate tourism business at the beginning of the shoulder season.	
	Canada Day Celebration	Waterton Townsite	- local celebration featuring parade, special events	- several days in late July	- secondary attraction of local, regional significance.				
	National Park Interpretive Programs	based out of facilities at Waterton Townsite	- nature/education oriented indoor theatres audio-visual programs, outdoor guided walks	- ongoing through July/August	- secondary attractions of local, regional significance				

TOURISM ATTRACTIONS - Region (Primary Study Area)

	NAME	LOCATION	DESCRIPTION	OPERATION	SCALE	VISITATION		DEVELOPMENT/ENHANCEMENT	
						MARKET	USERSHIP	POTENTIAL	CONSTRAINTS
MAN-MADE	Morgan Lybert Quarter Horse Ranch	2 km. southwest of Cardston off of Beazer Rd.	- raising, training, and selling quarter horses. - equestrian riding instruction for out-of-town, province, country clientele	- open year-round	- secondary attraction of regional, provincial significance	provincial, national, international	approx. 300 to 400 per year	- Potential upgrade of facilities (guest ranch for tourists)	
	Glenwood Cheese Factory	Village of Glenwood, approx. 35 km. N.W. of Cardston.	- private (Alpha Dairies) cheese producing factory which is one of only a few in the province.	- open year-round	- secondary attraction of regional, provincial significance	Tourists making day excursions from Waterton Park.	10 to 20 visitors per day during peak season.	- Considering the development of an enclosed viewing area inside factory.	- Health regulations do not permit visitors inside factory (visitors look through outside windows at present)
	Badger Valley Ranch	10 km S.W. of Cardston on Beazer Road.	- large ranch house used for reunions and other group functions such as business retreats	- open year-round	- secondary attraction of local and regional significance	local, regional		- Recently initiated trail ride opportunity for tourists.	
	Wild Rose Game Farm	7 km east of Cardston near S.R. 501.	- small, private collection of wildlife	- year-round	- secondary attraction of local and regional significance	local, regional			- no signage, poor road access - private collection only - no on-site visitation (viewing from road only)
	Chateau Isabella	Hamlet of Beezer S.W. of Cardston.	- old fashioned inn that sells package (accommodation and site seeing) tours to U.S. tourists	- seasonal	- accommodates groups of 45 - 55 people - secondary attraction	international			

TOURISM ATTRACTIONS - Region (continued)

	NAME	LOCATION	DESCRIPTION	OPERATION	SCALE	VISITATION		DEVELOPMENT/ENHANCEMENT	
						MARKET	USERSHIP	POTENTIAL	CONSTRAINTS
NATURAL	Police Outpost Provincial Park	33 km. S.W. of Cardston. Access from Highway 2 or 5	- day-use and campground park situated in foothills area north of U.S. border - oriented around a small lake	- open year-round	- secondary attraction of Provincial significance - importance rating of 5	- local/regional/provincial day-use and campground use visitation	- 2,925 day-use parties (1987) - 2,607 occupied campsite nights (1987)	- facility upgrading completed in 1988	
	Woolford Provincial Park	16 km east of Cardston. Access off of gravel-surfaced local road	- 35 hectare day-use and campground park situated in scenic St. Mary's River Valley.	- open year-round	- secondary attraction of Provincial significance - importance rating of 5	- local/regional day-use visitors - small percentage of camping activities	- 1,475 day-use parties (1988) - 268 occupied campsite nights (1988)		- poor road surface (gravel) access - confusing signage (Woolford Prov. Park from highway and Alberta Recreation Area from municipal road)
	St. Mary's Reservoir	20 km N.E. of Cardston. Gravel local road access off of Highway 5.	- lake and recreation area formed from dam located on St. Mary's river.	- seasonal	- secondary attraction of regional significance	- local/regional day-use and camping visitation			- day-use recreation area only
	Waterton Reservoir	35 km. N.W. of Cardston. Adjacent to Secondary Road 505.	- lake and recreation area formed from dam located on Waterton River.	- seasonal	- secondary attraction of regional significance	- local/regional day-use visitation			- day-use recreation area only
	Jenson Reservoir	25 km. east of Cardston.	- lake and recreation area formed from dam.	- seasonal	- secondary attraction of regional significance	- local/regional day-use visitation			- day-use recreation area only

TOURISM ATTRACTIONS - Magrath (Primary Study Area)

	NAME	LOCATION	DESCRIPTION	OPERATION	SCALE	VISITATION		DEVELOPMENT/ENHANCEMENT	
						MARKET	USERSHIP	POTENTIAL	CONSTRAINTS
MAN-MADE	Buffalo Slope Grain Elevator	Adjacent to Highway 5.	- State of the art grain elevator. - First of its kind built in Alberta.	- Privately operated by Alberta Wheat Pool. - Tours available Mon.-Fri. year-round.	- Secondary attraction (pass-through visitation only). - Importance rating of 1.	Agricultural tour groups from Prairies, Europe, U.S. Japan.	- a few hundred visitors per year - average 3 - 4 tours per year (spring/fall)		- Wheat Pool don't promote tours because of additional staffing requirements.
NATURAL	Pothole Creek	Through Magrath.	- Scenic creek that offers rare vegetation (one of few areas of Diamond Willow in Alberta).	- Year-round.	- Secondary attraction of local regional significance.	Local day use activity.		- Town has plans to develop an interpretive nature trail.	
EVENTS	Yearly Town Birthday Celebration	In Magrath.	- family softball tournament	- July 24th weekend.	- Secondary attraction of local, regional significance.	Local; regional.			